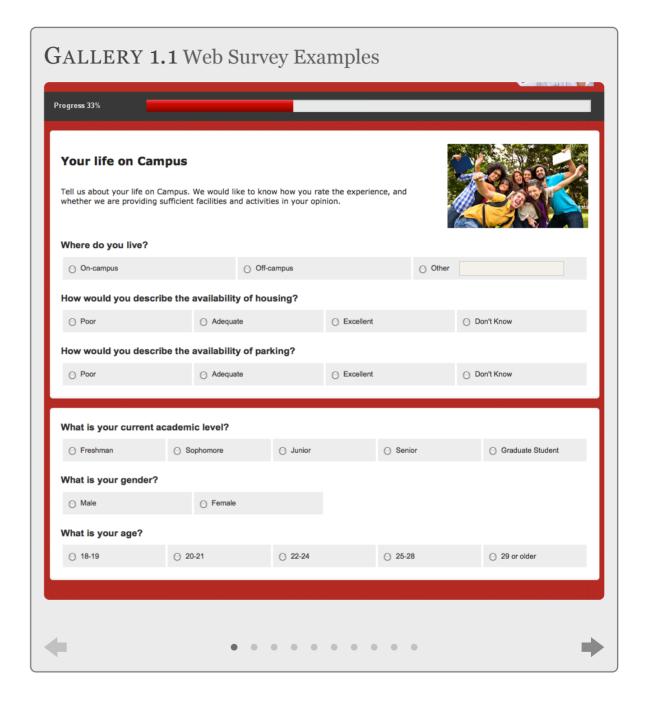
# Creating Web Surveys



# Surveys on the Web

Web Surveys are an efficient means of collecting information from a large number of respondents very quickly.

The proliferation of advanced internetcapable devices makes it easier than ever before to design engaging surveys that can provide you with quality data.



### Introduction

#### IN THIS SECTION

- 1. What is a Web Survey?
- 2. Challenges faced when creating a Web Survey
- 3. The rise of Hosted Survey Tools
- 4. Is Desktop Survey Design software dead?
- 5. Anonymous vs. Non-Anonymous Web Surveys
- 6. Considerations when running a a Web Survey project

#### What is a Web Survey?

A Web Survey can be described simply as a set of questions - sometimes only a single question, though this is normally described as a "poll" - that are displayed in a logical manner to be answered by respondents through a Web Browser.

The goal of a Web Survey is to collect data efficiently. By using

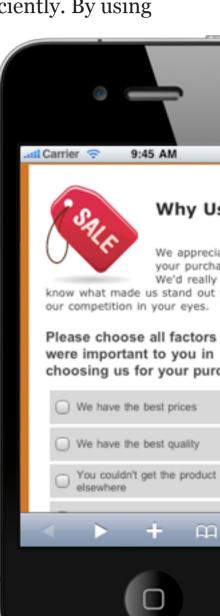
the Web, a large number of people can be reached quickly and cheaply.

# Challenges faced when creating a Web Survey

There is a certain level of underlying complexity associated with Web Surveys. Key challenges that must be dealt with when creating a Web Survey are:

- The survey content needs be appealing and easy to read
- Input fields need to be easy to complete
- · All data entered needs to be stored
- Reports need to be generated
- Other issues, such as sending of invitation Emails, need to be dealt with

Perhaps one of the biggest challenges that has arisen quite recently is the fact that the



methods used for participating in Web Surveys has changed as in the last few years the "Web" has moved from PCs to mobile devices like tablets and smartphones. This adds another level of complexity to managing "Content".

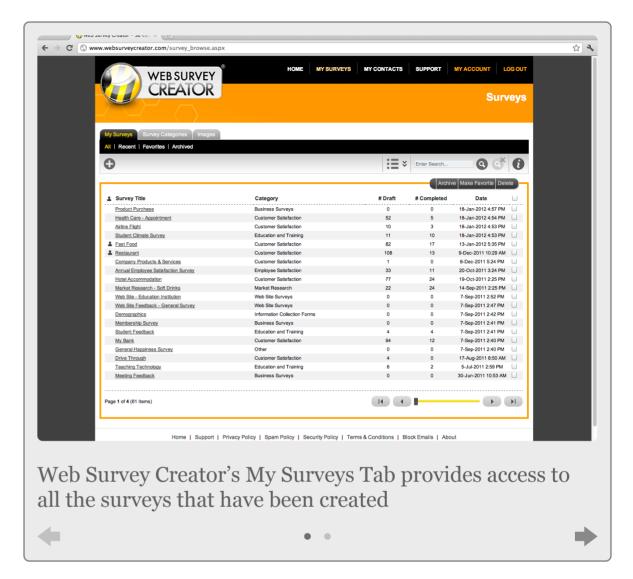
#### The rise of Hosted Survey Tools

Clearly the issues that must be resolved to get a Web Survey up and running can only be dealt with by using an application that helps you create a Web Survey. While both Desktop and Web-based applications have been around for a while, the industry is fast moving almost exclusively to Web-based (or "hosted") survey tools.

Hosted tools have a number of advantages over desktop-based competitors:

- They can be accessed from any Web-browser
- There is no software to be installed
- Data-storage, and all related activities such as backups, are handled for you
- Access is usually provided for a monthly fee (rather than having to make a large up-front payment)

One of the biggest factors that has lead to the growth of hosted tools is the level of advancement we have seen in Web browser capabilities over the last few years. Leading hosted survey tools have leveraged these advances to produce tools



that have easy-to-use visual designers, and other features that were formerly only found on desktop products.

#### Is Desktop Survey Design software dead?

There are still some specific circumstances when a desktop survey design tool may be more appropriate than a hosted tool. These circumstances generally only apply to large corporates and government departments:

 Web browsing is locked down making use of hosted products impractical

- Very old browsers are being used that do not support the technologies needed to run a hosted tool
- Data must be stored internally not on a hosted site based on internal organization rules.

Under these circumstances, a Desktop based survey tool such as our **Professional Quest** software can be used to create your surveys.



Visit <a href="http://www.professionalquest.com">http://www.professionalquest.com</a> for further information.

### Anonymous vs. Non-Anonymous Web Surveys

There are two general types of respondents for Web surveys:

Anonymous	Non-Anonymous
Respondents	Respondents
Respondents click on a general link to complete a survey, and they are not identified in any way	Respondents are sent an Email with their own personal link. Their response can be directly linked back to them

For a majority of surveys, anonymity is actually desired. An anonymous respondent is often more likely to provide an honest answer. For example, if you are running an **Employee Engagement Survey**, employees are likely to be more honest if they feel their opinions can not be tracked back to them.

On the other hand, there are times when knowing who the respondent is will be beneficial. For example, if you are running a Customer Survey, it would be useful to know which of your customers are unhappy. Unlike employees, they would be happy to be identified so that their issues are addressed.

# Considerations when building Web Surveys

Surveys can vary widely in purpose and content, but there are some common principles that apply to all Web Surveys. The

key things you need to consider when creating a Web Survey are as follows:

#### Planning Is Key

Any survey, no matter how simple, will benefit from planning. A badly designed survey will not receive a decent level of response, nor will it provide the results you are after (since you probably don't even know what results you really want).

#### Ensure You Have A Purpose!

While this seems obvious, many surveys have been created that are simply "fishing expeditions". They are longer than they need to be, and will receive a worse response rate because people prefer shorter surveys.

#### Don't Be Ambiguous

If you ask a question, you want to make sure that the answer you get is not affected by how the question is phrased. It is particularly bad when the answers offered confuse a respondent. For example:

#### How often do you catch a train?

- 1. Never
- 2. Rarely
- 3. Infrequently
- 4. Often

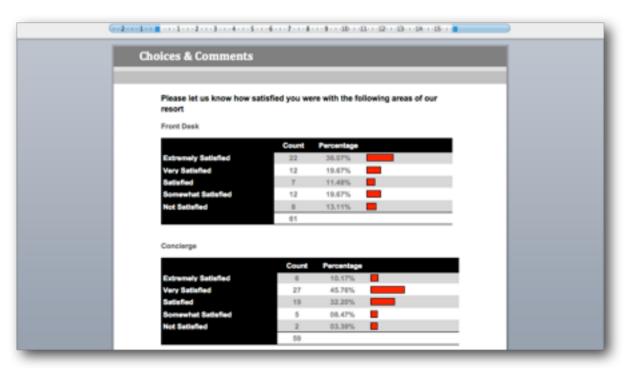
What is the difference between *rarely* and *infrequently*? These are ambiguous values, and should be avoided.

#### Keep It Short!

No one likes to complete a long survey - the shorter your survey is, the more completed responses you will receive. The longer people spend completing a survey, the less care they will take with their answers (they will lose interest) so more is definitely not better.

#### Think About The End Result - Reports

When planning a survey, it is easy to lose sight of the ultimate goal - high quality, meaningful reports. Make sure when you are planning that you have thought of what reports you want, and how you want to filter and cross-tabulate them. You can't filter based on a question you never asked!



## Web Survey Creator

Creating a Web Survey can only be achieved by using the right tool for the job. While there are many options open to you, few if any provide a solution with the features of our Web Survey Creator (WSC) product. The remainder of this book will focus on creating Web Surveys using Web Survey Creator.

#### Opening WSC for the First Time

Web Survey Creator can be accessed from the following Web address using any modern browser:

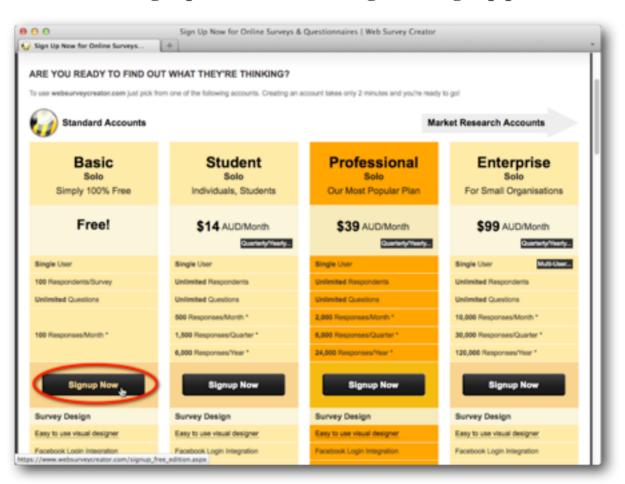
#### http://www.websurveycreator.com

The first time you visit the site, you will need to set yourself up as a registered user. You can do this by clicking on the Signup menu at the top of the screen.



You must choose which version of the software you wish to purchase. If you are not ready to purchase the software yet, you can choose the Basic Edition, which is free.

Click on the Signup Now button to begin the signup process.



Fill in your details, and press the Create Account button.



You can optionally sign in using your Facebook credentials. This will mean that you won't need to learn yet another login – your Facebook login is all you need to get into your account. If you have Facebook open on your computer, when you go to Web Survey Creator, it won't even need to ask you for your login details at all – it will know who you are and go straight to your surveys.

#### **Activating Your Account**

You will be sent an Email to activate your account. This is to ensure you entered your email address correctly, and you can access that Email account. For ease of use, the system gives you 7 day's grace to activate your account, so you can use it immediately without waiting for the activation Email.

An unactivated account will have a warning at the top of the screen until activation occurs.



#### Where to get help

#### On-line Help

Online assistance can be found from the Support menu at the top of the page.



From within the Support area, you can:

- 1. See a listing of any questions you have previously asked, together with their status, and any answers given (you must be logged in to get to this tab)
- 2. Select a Help Topic to view
- 3. Go to the Support Request Form to enter a support request

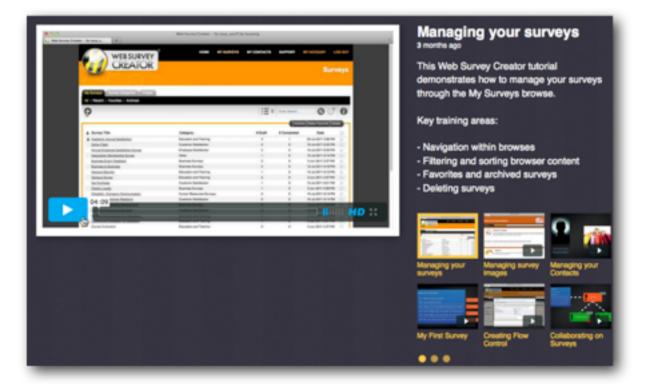


#### **Tutorials**

Step-by-step tutorials are available on key areas of the software. These tutorials can be accessed by pressing the Information button on the toolbar from wherever you are in the software.



The tutorials cover key areas of the software, including areas covered in this manual.



# Creating your first Survey

In this chapter, we will create our first survey using Web Survey Creator. This is the time to get into good habits and really start to use the power of the product.

A step-by-step video at the end of the chapter can be watched to review everything we go through in detail.



## **Creating Survey Content**

#### IN THIS SECTION

This section will take you through the creation of a simple survey with the following content:

- 1. What is your name?
- 2. How old are you?
- 3. Which of our products have you used?
- 4. How happy are you with our products?
- 5. How happy are you with our service?
- 6. Do you have any other comments?

To get the most out of this section you need to follow the instructions and create the survey in WSC.

If you are unsure of anything, watch the full stepby-step video at the end of the section.

#### Start with a Plan!

The key to any good survey design is planning. The approach you take to creating your survey will affect the quality of the end result.

Our first survey is going to be a Customer Satisfaction Survey with the following content:



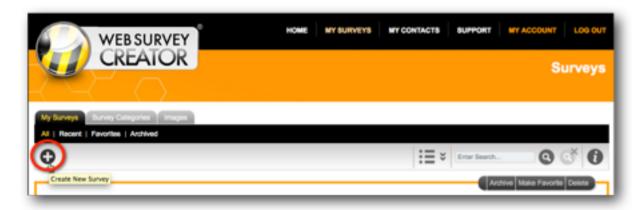
These questions naturally fall into a number of areas - Demographics, Products, Satisfaction and Comments.

While we could place all the questions in a single page, particularly for such a short survey, best practice is to separate similar questions onto different pages.

We will create each page as we need it.

#### Creating A Survey

To create a new survey, we press the *Plus button* on the *My Surveys Tab*.

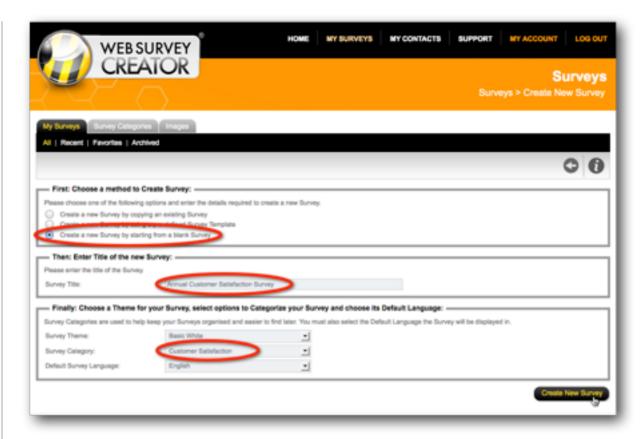


There are a couple of choices we need to make:

- 1. Do we want to create a survey from scratch, or use a previous survey or a survey template as a starting point?
- 2. What do we want to name our survey?
- 3. What theme, category and language do we want to use?

In our case, we are going to build the survey from scratch, we're going to call it "Annual Customer Satisfaction Survey" and we will place this survey in the Customer Satisfaction category.

Theme and language can remain at the default settings.



When we save our survey details, we are immediately taken into the **Content Designer** for the survey.

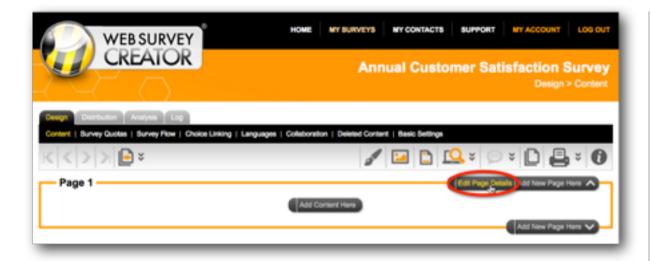
#### ADDING PAGES

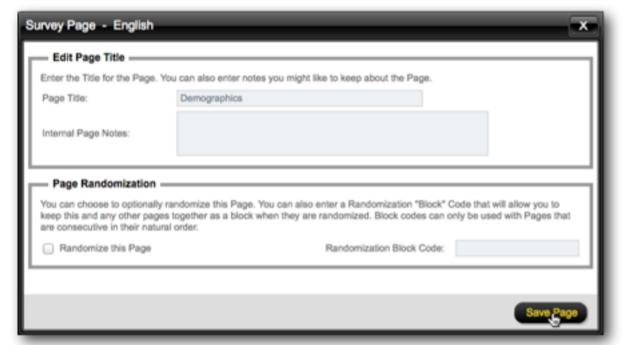
Based upon our prior planning we know we will need 4 pages.

Our first page is created for us when the survey is created.

Pages are automatically named for us – this page is called "Page 1". While this doesn't need to be changed, it is easy to change the name to "Demographics".

We click the Edit Page Details button to enter our new page name.





#### ADDING OUR NAME QUESTION

We now need to start adding our questions, one at a time. Questions are added by pressing the *Add Content Here button*.

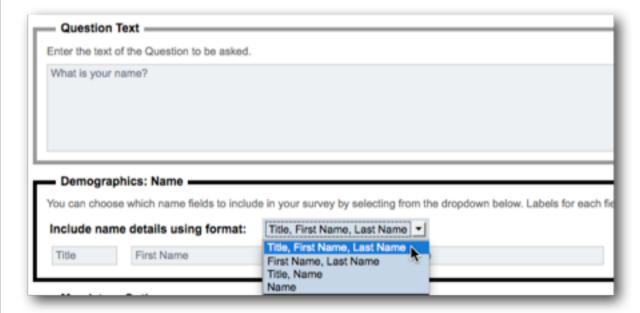


Whenever adding any content to a survey, we always start by choosing the type of content we want to add.

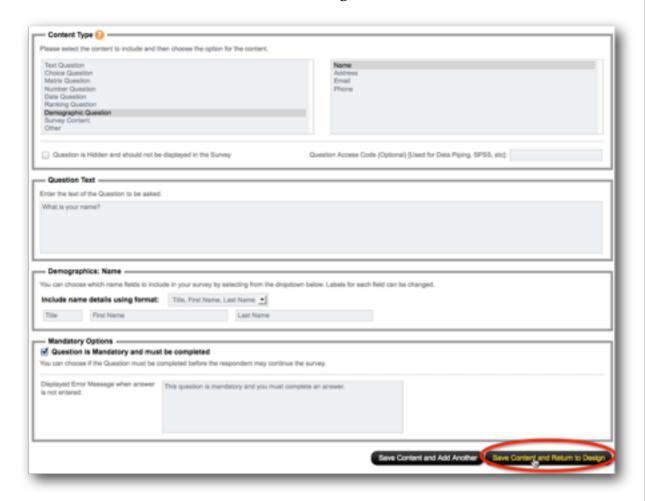
WSC has a number of specialized question types for certain common questions like "Name". If we need to ask a respondent's name, rather than using a text question, we can use a specific demographics question.



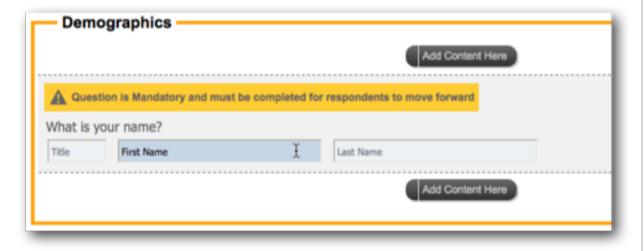
When we select the **Demographic Question Type** and choose *Name*, we see specific formatting that can be selected for this type of question.



We'll make this question mandatory, and save it by clicking *Save Content and Return to Design*.



The question is shown in the Content Designer in the same layout as it will appear in the survey.



Notice how much better the question now looks compared to a single text question. We are now going to get well formatted names entered into our survey.

#### ADDING OUR AGE QUESTION

Let's move onto the Age question. We want to add it after the name question, so we click on the Add Content Here button below the name question.



We need to choose content type again. Age is often set up incorrectly as a number. While asking for your exact age is technically correct, how many people want to tell you that, and do we actually need to know the exact age?

We use a different type of question – instead of getting someone to enter their numeric age, we will give them a range of age-groups to choose from.

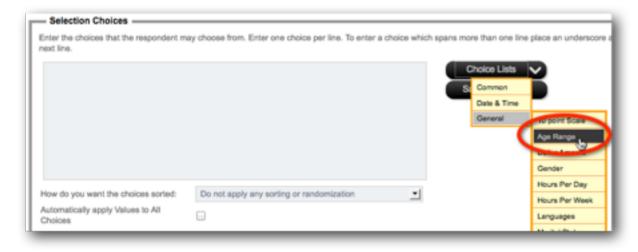
This means we need to select a Choice Question. We want to show the choices as buttons on the screen, and of course someone can only be in one age group, so we'll select "Multiple Choice, Radio Buttons (Choose Only 1)".



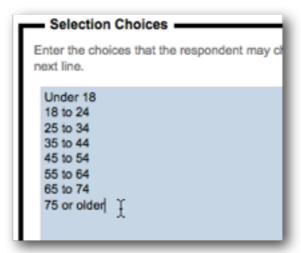
We enter the question text "How old are you?" and then we need to enter the **selection choices** for the question.

These need to be entered one per line.

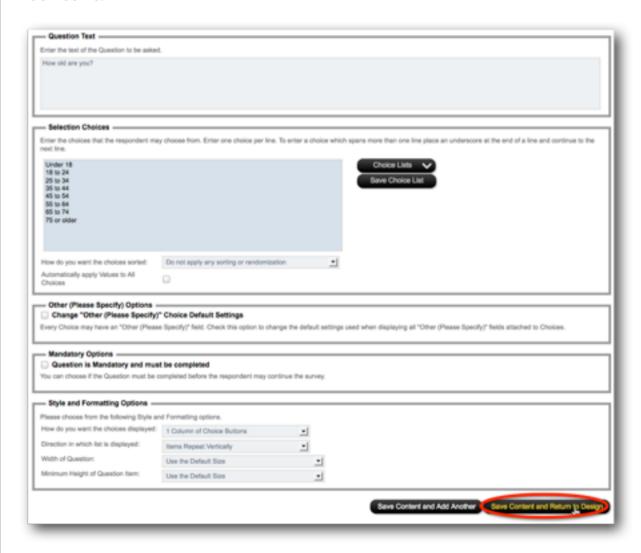
Fortunately we have access to pre-built choice lists, and an Age Range is one of the lists we have access to.



This list looks good, but we'll extend the ranges shown with one additional range for 65 to 74 year olds.



We won't make this question mandatory, because people may not wish to tell me their age. We can therefore simply save the content.



#### ADDING OUR PRODUCTS QUESTION

Adding the products questions is very similar to adding the age question, but with a few differences.

We want to place it on the second page of the survey.

We can add a page from the toolbar, or by simply clicking *Add New Page Here* on the bottom of our first page.



By default it is called Page 2, but as before, we can edit this.



We will change this page's name to "Products".



Our company produces electronic goods, so the list of products we will show are electronics goods.

Of course our customers could buy multiple different products from us, so we MUST ensure that this is a "choose many" question type.

The importance of picking the correct type of choice question can be clearly seen in this example.

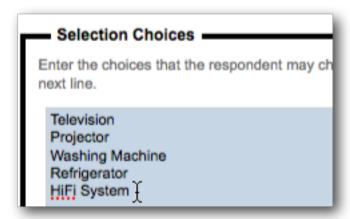
The #1 error in survey design is choosing the wrong type of choice question. Always ask yourself, "Does it make sense that I can pick more than one choice?".

In our example, being able to select multiple products makes sense, but it is impossible for me to be in multiple age groups.

We add the question using the steps we have already learnt:

- 1. Click Add Content Here
- 2. Choose Choice Question -> Multiple Choice, Checkboxes (Choose Many)
- 3. Enter our question "Which of our products have you used?"

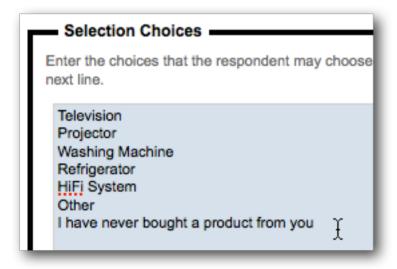
4. Enter the choices:



Let's also add two additional options:

- 1. "Other" for any of the minor products we sell that are not in the list; and
- 2. "I have never bought a product from you" to ensure people who never bought from us have a valid option to pick.

The Selection Choices will therefore look as follows:



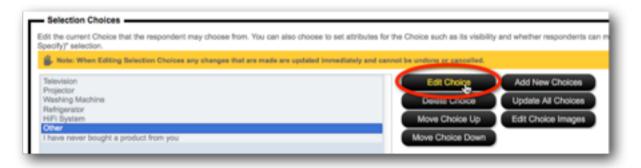
After we save this question, we can see a respondent can choose multiple answers.



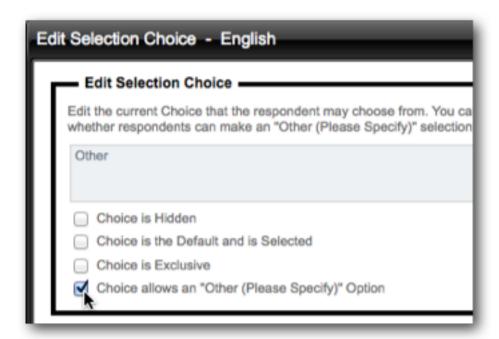
We can make a couple of modifications to these values to enhance the user experience. Let's edit this question.



We'll edit the "Other" choice.



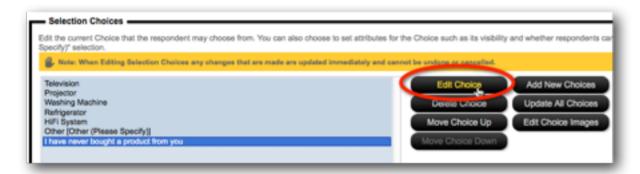
We will indicate that it is an "Other, please specify" option.



We save this change by clicking the Save Choice button.



We will also edit the "Never bought" choice.



We will make this choice exclusive. This means whenever this option is checked, all other options will be unchecked automatically.





These values will now have specific behaviors based upon these new settings.

#### ADDING OUR SATISFACTION QUESTIONS

We will add a third page to our survey, and then add our questions about happiness:

- How happy are you with our products?
- How happy are you with our service?

These questions could of course be created as two Choice questions. Respondents could choose one of the following happiness choices.

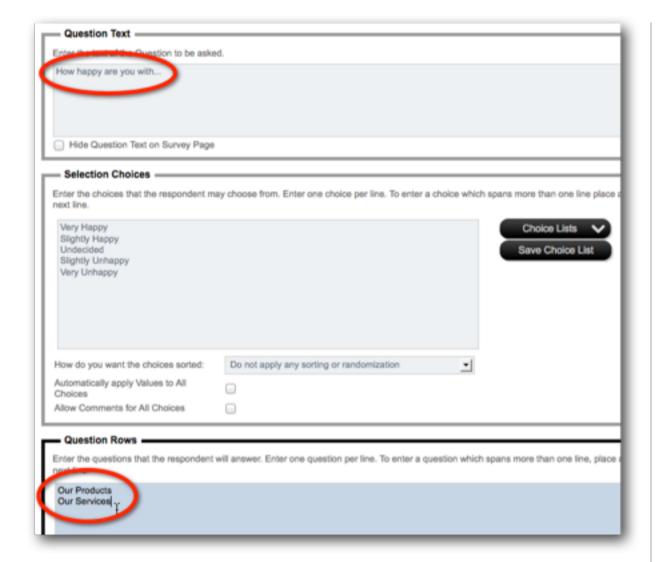
- Very Happy
- Slightly Happy
- Undecided

- Slightly Unhappy
- Very Unhappy

However, this is another situation where with a little thought we can greatly improve the look and functionality of our survey. Both these questions have the same list of choices, so we can put them together in a **Matrix Question Type**.



The question can be changed to "How happy are you with..." and "Our Products" and "Our Services" can be added as rows.



After we save the question, we can see in the designer how the matrix is a compact way of showing these two questions.



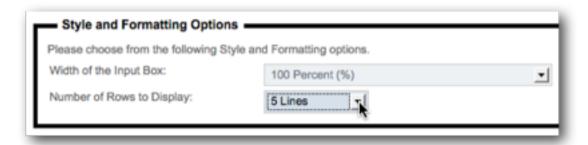
#### ADDING OUR COMMENTS QUESTION

The last question we want to add is our comments question. We will:

- 1. Add our Comments Page
- 2. Click Add Content Here
- 3. Choose *Text Question -> Multiple Lines of Text*



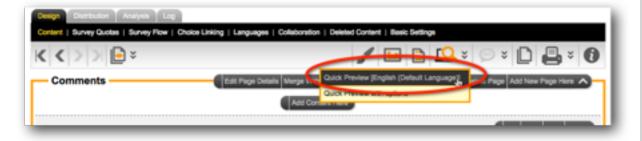
- 4. Enter our question "Do you have any other comments?"
- 5. We will also add some formatting to give respondents a bit more space lets make the comments go across the page, and show 5 lines for them to enter their comments.



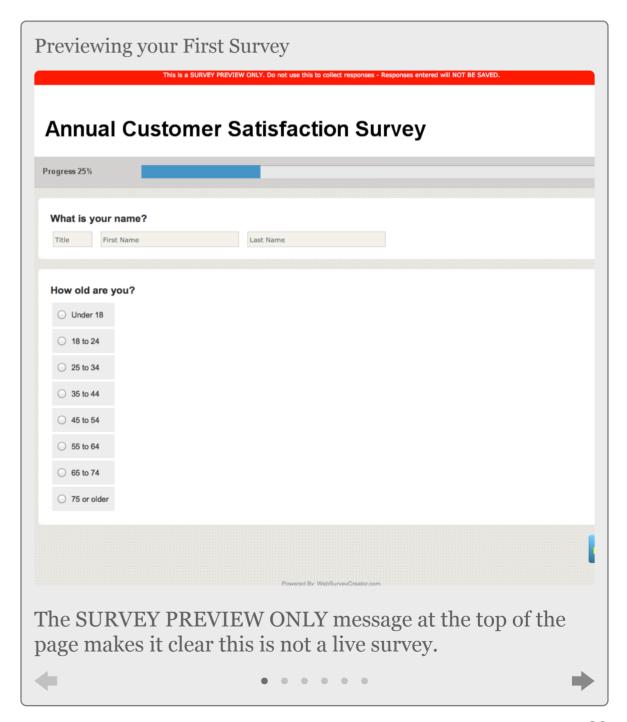
Fantastic! – our survey is done.

# Previewing your Survey

To see how the survey looks, we can preview it by selecting the *Quick Preview* option.

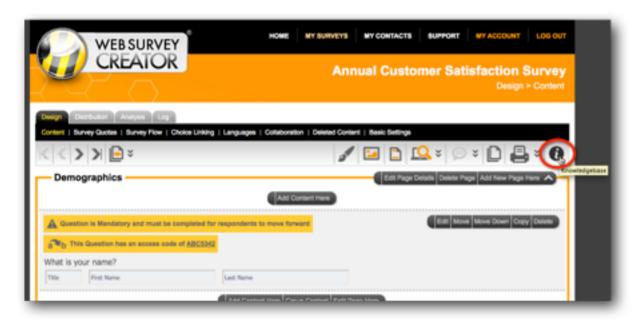


Previewing is particularly useful for testing logic like mandatory questions, and the exclusive and other settings we added to our product list question.



## Step-by-step Video

If you would like to see how this first survey has been built, you can view it in our step-by-step video. You can access this video online by pressing the *Knowledgebase button* on the toolbar while working on survey content.





created in this chapter.

21

# Reference: Content Tags

#### IN THIS SECTION

This section provides a listing of all of the "Content Tags" that may be used in Web Survey Creator.

#### What are Content Tags?

Content Tags are simply a means of incorporating standard HTML functionality in survey content, without exposing the full range of HTML to a survey designer (doing the later would open the system to all sorts of security and layout issues).

#### Where can Content Tags be used?

Content Tags can be used anywhere you use standard text content in your surveys. This includes:

- 1. Text Content blocks
- 2. Question Text
- 3. Choice Text

Most of the time, straight text will suffice in these areas, but Content Tags can be useful if you want to:

- 1. Place emphasis on part of the content
- 2. Add small help text below your question
- 3. Add Bullet Points
- 4. Use color in your text
- 5. Place an image in some text content

## Listing of Content Tags and their Usage

TAG COMBINATION	DESCRIPTION	USAGE
<h1></h1>	H1	<h1>My Heading</h1>
<h2></h2>	H2	<h2>My Sub Heading</h2>
<b></b>	Bold	<b>This is bold</b> but this isn't
<strong></strong>	Bold	<strong>This is bold</strong> but this isn't
<u></u>	Underline	<u>This is underlined</u> but this isn't
<i><i></i></i>	Italic	<i>This is italicized</i> but this isn't
<pre><ol><li></li></ol></pre>	Ordered Lists - with Css Ordered List Style e.g upper- roman	<ol><li>One</li><li>Two</li></ol>
<ul><li><li></li></li></ul>	Ordered Lists - with Css Unordered List Style e.g square	<ul><li>Banana</li><li>Apple</li></ul>
<nobold></nobold>	No Bold - Turns of Bold where the current style is Bold	This is in Bold <nobold>but this is not</nobold> but this is again.
<small></small>	Equivalent to font-size:small	<small>This is small</small> but this isn't

TAG COMBINATION	DESCRIPTION	USAGE
<webhelptext></webhelptext>	Equivalent to font-size:x-small; font-style:italic	<webhelptext>This is small and italicized</webhelptext>
<pre><link:mailto:emailaddress>Text <link:mailto:emailaddress  nostyle="">Text</link:mailto:emailaddress ></link:mailto:emailaddress></pre>	Link for Email Address - with no style	<li><li>k:mailto:fred@me.com&gt;Mail to Fred</li></li>
<li><li>k:url&gt; Text</li><li>k:url nostyle&gt; Text</li></li>	Link from http or https based URL - with no style	<li><li>k:http://www.me.com&gt;Click to Go To Me</li></li>
<image:url> <image:url tooltip></image:url tooltip></image:url>	Image from http or https based URL - jpeg/gif/png - with Tooltip	<image: cat.jpg="" http:="" www.me.com=""></image:>
<image:filename> <image:filename tooltip></image:filename tooltip></image:filename>	Image from Person's File - jpeg/gif/png - with Tooltip	<image: cloud.jpg=""></image:>
<font:text></font:text>	Font using CSS Font Style	<font: 22px="" bold="" courier="" italic="">Text</font:>
<color:#hex></color:#hex>	Color using HEX Name	<color:#334455>Text</color:#334455>
<color:name></color:name>	Color using Font Name	<color:red>Text</color:red>
<colour:#hex></colour:#hex>	Color using HEX Name (English Spelling)	<colour:#334455>Text</colour:#334455>
<colour:name></colour:name>	Color using Font Name (English Spelling)	<colour:red>Text</colour:red>

# Survey Flows

All but the most basic Web Surveys require some form of branching or page skipping. This is known in WSC as "Flow Control". In this chapter, we will look at how to add flow control to your surveys.

A step-by-step video at the end of the chapter can be watched to review everything we go through in detail.



# Creating a Survey Flow

#### IN THIS SECTION

- 1. What are Survey Flows?
- 2. Creating a Survey Flow in Web Survey Creator
- 3. Flow Control Conditions
- 4. Conditions with Multiple Rules

#### What are Survey Flows?

The best way to understand flows is to look at an example. We will use the Customer Satisfaction Survey we created in the previous Chapter.

The basic structure of that survey is as follows:



We broke this survey into a number of pages – Demographics, Product, Satisfaction and Comments. In this survey, a respondent currently answers the questions on each page, one page at a time.

An example of a survey flow is skipping the satisfaction page and jumping from the products page to the comments page.

So, why would we want to do this?

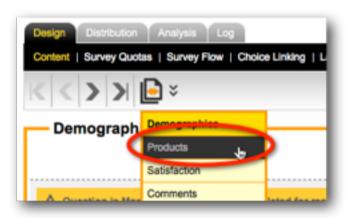
In our survey the products question includes a choice that indicates the respondent has never bought a product from our

company. If they have never bought a product, it makes sense that they will not be able to answer any questions about our products and service. We will therefore skip those questions, and go straight to the comments question.

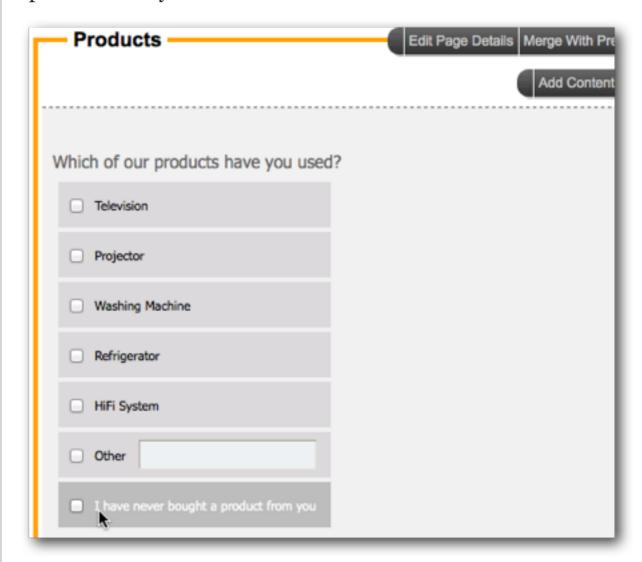


#### Creating a Survey Flow in Web Survey Creator

Let's open our Customer Satisfaction Survey in Web Survey Creator, and go to the second page to have a look at the product question.



We can see that there is a Choice called "I have never bought a product from you".

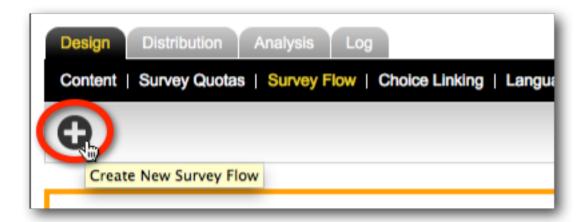


This will be the choice that, if chosen, should hide the third page in our survey.

To add flow control to our survey, we click on Survey Flow from under the Design tab.

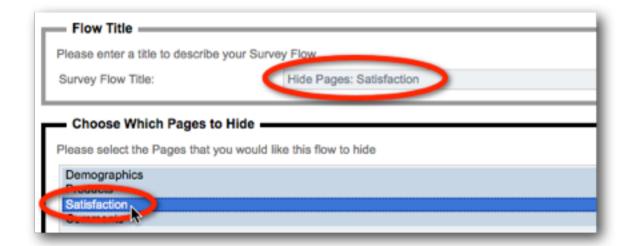


There are currently no flows set up in this survey. We click the *Add toolbar button* to add a new flow.



The first step in setting up a flow is to choose the page or pages that will be hidden by the flow. In our example, we want to hide the satisfaction page.

Note that the Survey Flow Title is automatically updated for us.



We save the flow by pressing the *Save & Continue to Add Conditions button*.

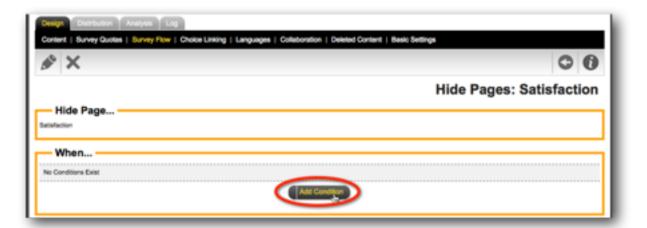


#### FLOW CONTROL CONDITIONS

There are two parts to any flow:

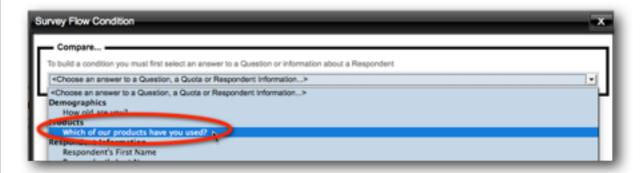
- 1. Choosing the Pages we want to hide
- 2. Setting the Conditions that when passed, will hide the page.

We have already set up the first part of our flow - now we need to set our conditions.



Note that only questions that appear before the page we want to hide are selectable in our conditions.

We want to choose the question "Which of our products do you use?"

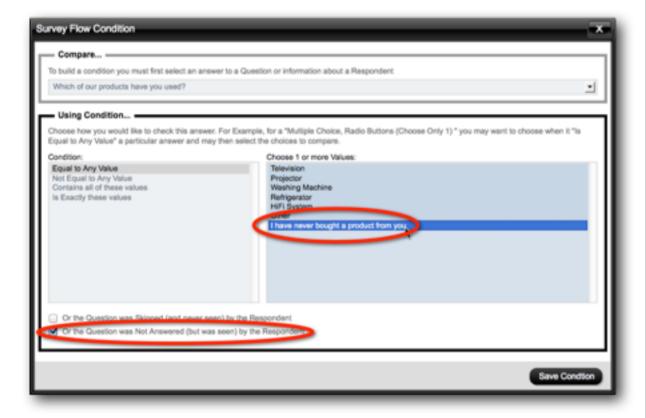


Based upon the Choices within this question, we are shown the condition types and choice values we can use in our condition.

We want to hide the page if the answer to this question is equal to "I do not use any products".

If this question is flagged as non-mandatory, it would be possible for a respondent to not choose any answer. We will assume an unanswered question is the equivalent of saying that they don't have any of our products.

Therefore, we want to indicate that the condition is considered to be met if the question is not answered.

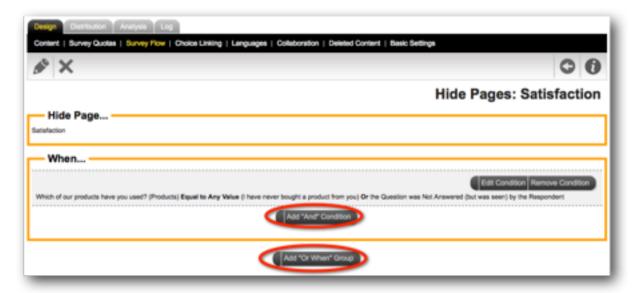


We can save the condition by pressing the *Save Condition* button.

That's all we need to do for our example.

#### CONDITIONS WITH MULTIPLE RULES

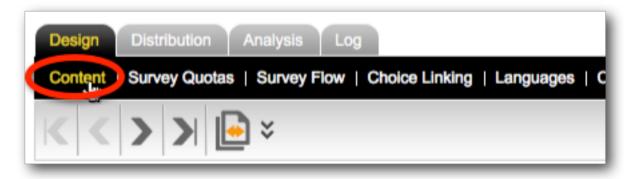
Once we have entered our condition, the survey flow editor looks as follows:



As you can see, "and" and "or" conditions can both be added to create a more complex condition if needed in the future.

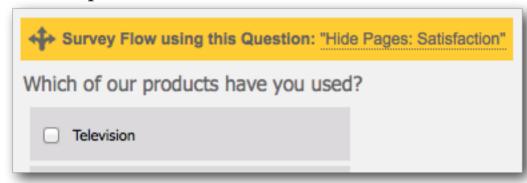
#### RETURNING TO THE SURVEY DESIGN

We can click *Content* under the *Design tab* to jump back to our Survey content.

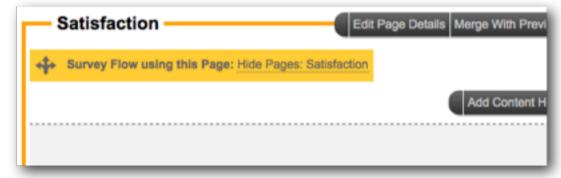


If we go through the pages of the design, we can see that the flow is flagged in two places:

1. On the question used in the flow



2. On the page that will be hidden by the flow.



This makes it easy to see where flows are being used, and a quick way to jump to the flow itself should we need to change it.

# Previewing your Survey

To see how the survey looks, we can preview it by selecting the *Quick Preview* option.



We need to preview our survey to check if the flow is working.

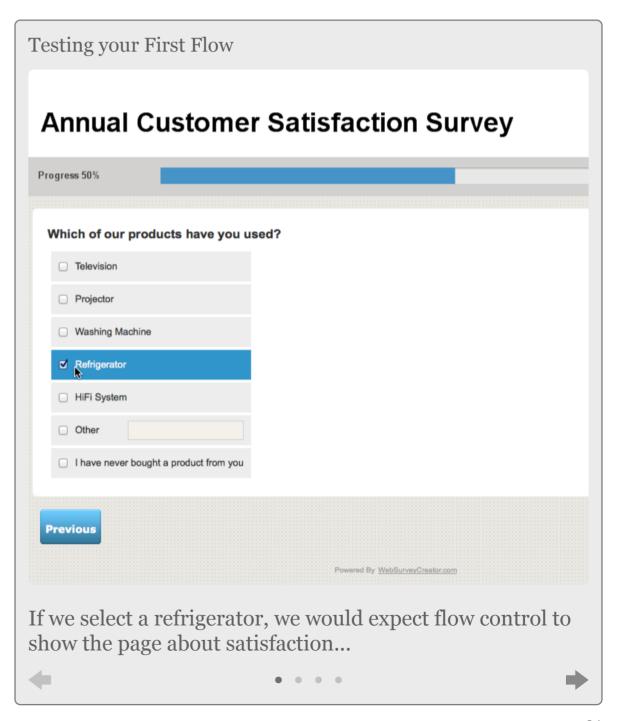
Let's assume we use a refrigerator.

Since we use one of the company's products, the questions about our level of satisfaction are shown.

Now, let's go back and say we do not use any products.

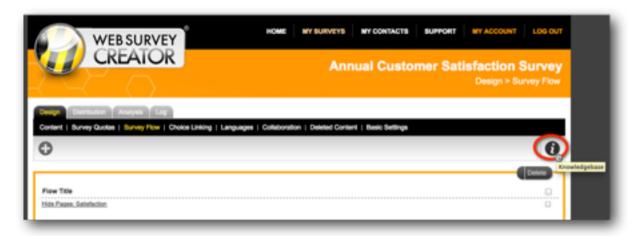
When we press next we are immediately jumped to the comments page.

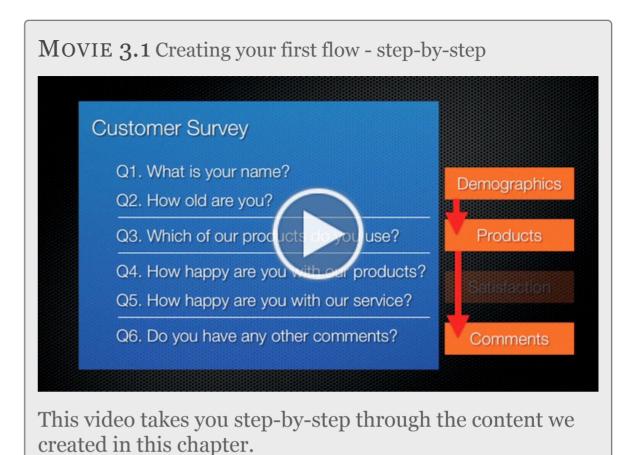
Great – our flow is working as we intended.



# Step-by-step Video

If you would like to see how this first survey flow has been built, you can view it in our step-by-step video. You can access this video online by pressing the *Knowledgebase button* on the toolbar while working on survey content.

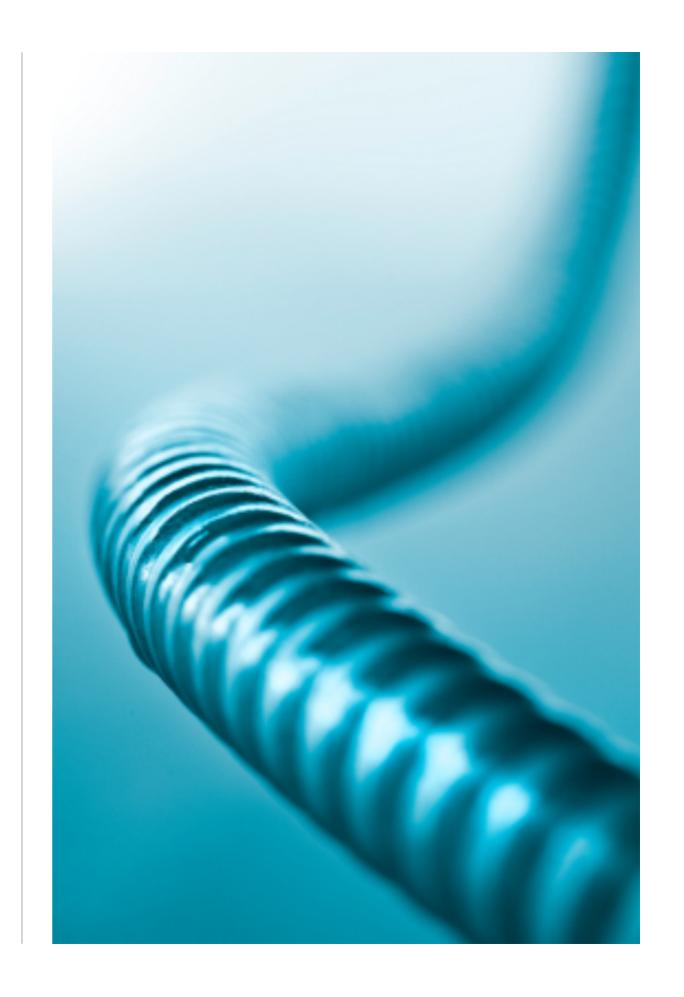




# Data Piping

Data Piping allows you to pass respondent and response information into survey content.

This makes it possible to personalize the survey, or customize survey content based upon an individual respondent's answers.



# Using Data Piping

#### IN THIS SECTION

- 1. Improving our Customer Satisfaction Survey
- 2. Setting up Data Piping
  - 1. Step 1: Create an Access Code
  - 2. Step 2: Using an Access Code in our Content
  - 3. Step 3: Testing the Data Piping

### Improving our Customer Satisfaction Survey

The best way to understand data piping is to look at an example. We will use our *Customer Satisfaction Survey* for this example.

We already have the following question in this survey:

Which of our products have you used?
☐ Television
Projector
☐ Washing Machine
Refrigerator
☐ HiFi System
Other
I have never bought a product from you

If a respondent chooses one or more products, they are asked how they rate our products and services:



At the moment, the question is very generic:

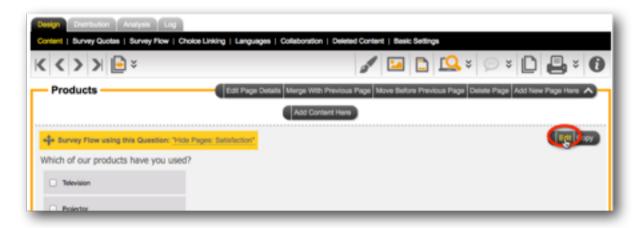
How happy are you with...

Using **Data Piping** we can have a much more specific question that reminds the respondent what they entered:

#### Setting up Data Piping

STEP 1: CREATE AN "ACCESS CODE"

Data Piping can use any question that has been set up with an **Access Code** as the source of the data piping data. We want to use the products question as the source of the data piping data. We can click the *Edit button* to edit this question:

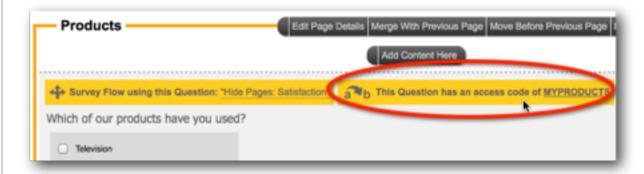


The Access Code can be entered for the Question. We can enter any alphanumeric characters for this code:



We have called it *MYPRODUCTS*. We save the question, and it is ready to be used.

The code we are using for this question is shown in the designer.



STEP 2: USING AN ACCESS CODE IN OUR CONTENT

Now that we have set up our Access Code, using it in the survey content is as simple as entering the code as part of our survey text. The code must be entered in the format:

[@ + ACCESS CODE + @]

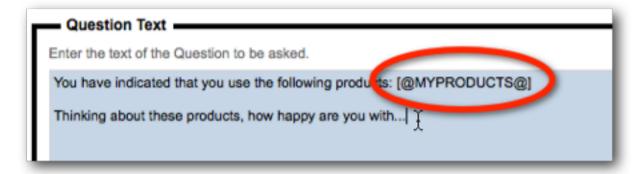
So, in our example, the code we would need to use would be:

[@MYPRODUCTS@]

We will edit our satisfaction matrix to add this code:



We will change the question text so that it refers to the products the respondent purchased:



Note how the code is entered just like any other piece of question text.

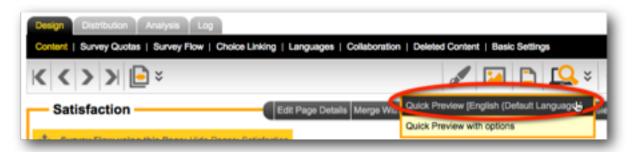
In the designer, the question will now look as follows:

You have indicated that you use the following products: [@MYPRODUCTS@]
Thinking about these products, how happy are you with...

The designer does not deal with responses directly, and therefore can only show the code itself. To test this data pipe, we need to preview the survey.

#### STEP 3: TEST THE DATA PIPE

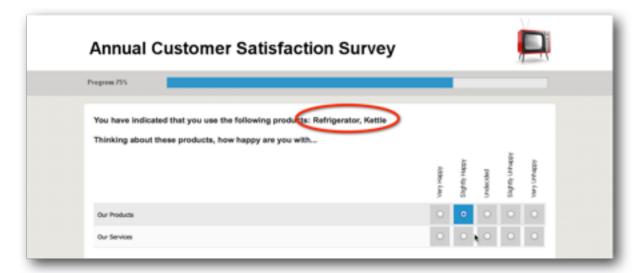
We can test a data pipe by previewing the survey.



To test, we will say that we have used a Refrigerator and a Kettle (which is entered as an "other" item).

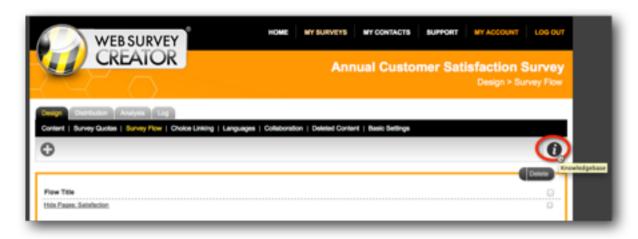
Which of our products have you used?	
☐ Television	
☐ Projector	
─ Washing Machine	
✓ Refrigerator	
☐ HiFi System	
✓ Other Kettle	
☐ I have never bought a product from you	

When we go to the next page in the preview, we see the data piping in action:



# Step-by-Step Video

If you would like to see more examples of creating data piping, a step-by-step video can be viewed. You can access this video online by pressing the *Knowledgebase button* on the toolbar while working on survey content.



You can choose the video on Data Piping from the list of videos on the *Training Video site*.



#### Video Content

The tutorial video looks at some specific instances on data piping:

- 1. Data piping from a single selection choice question
- 2. Data piping from a matrix question

While the questions differ from those shown in this chapter, the approach is exactly the same.

# MOVIE 4.1 Using Data Piping in a Survey How happy are you? HAPPINESS Very Happy Moderately Happy Moderately Unhappy Very Unhappy Why are you Very Unhappy?

This video takes you step-by-step through the creation and use of data piping in a survey.

# Data Piping Reference

Data Piping is straightforward from a *Source Question* perspective - as we have seen, you simply add a code to the question.



When it comes to using that data piping code, however, the way it must be used will depend upon the type of question we are referring to.

In the example above, the usage is simple:

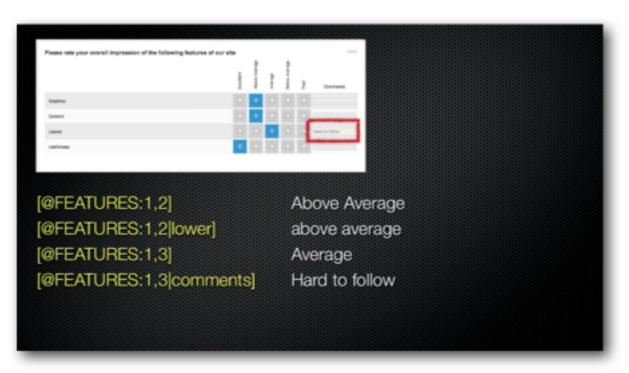
[@MYPRODUCTS@] will return a list of products

But what about a more complex example? A matrix question has both rows and columns, so entering a single textual code will not suffice because it doesn't tell me exactly which data I am looking for.

The tutorial video in the previous section explains how we must refer to both the grid and the row we are looking for:



The tutorial video also discusses the various formatting codes available. These can also vary depending upon the type of question.



Clearly, different question types need to be dealt with in different ways. This Data Piping Reference takes you through these different question types.

#### **Question Data Piping Reference**

STANDARDS USED IN THIS REFERENCE GUIDE

When looking at a particular data piping code, the structure of the code is as follows (spaces are only shown for ease of readability):

[@ QQQQQ: subcode | format @]

where:

**QQQQQ** is the code that has been entered on the source question

#hidden# may be included to hide any data pipe. The format for a hidden code would therefore be:

[@ QQQQQ: subcode | format #hidden# @]

DATA GRIDS (EG. MATRIX QUESTIONS)

Questions that take the form of "Data Grids" have a couple of elements which makes describing the data you are after a little tricker than other questions:

• Rows

- Columns
- One or more grids
- Additional data (e.g. comments on every row, tag data on choices)

The valid content for a Data Pipe code for these types of question is as follows:

subcode	x,y where $x = GRID$ and $y = ROW$
format	tag:TAGNAME where TAGNAME is the code of the TAG
	lower
	comments

#### Examples

[@FEATURES: 1,2@]

[@FEATURES: 1,2|lower@]

[@FEATURES: 1,2|comments@]

[@FEATURES: 1,2|tag:MOREINFO@]

#### DATE TIME QUESTIONS

Nil - all based on format of date time field

#### DEMOGRAPHIC ADDRESS

subcode	fulladdress / address (default) addressline / address city state postalcode / zipcode / postcode / zip country
format	lower upper singleline

#### Examples

[@ADDRESS: fulladdress@]

[@ADDRESS: city|upper@]

[@ADDRESS: fulladdress|singleline@]

[@FEATURES: 1,2|tag:MOREINFO@]

#### DEMOGRAPHIC EMAIL

subcode	None
format	lower upper

#### Examples

[@EMAIL|lower@]

#### DEMOGRAPHIC NAME

subcode	fullname (default) firstname lastname / surname title
format	lower upper

#### Examples

[@NAME: fullname@]

[@NAME: lastname|upper@]

#### DEMOGRAPHIC PHONE

subcode	None
format	lower upper

#### Examples

[@PHONE|lower@]

#### DROP DOWN LIST

subcode	None
format	lower upper a,b,c,,Z values for each choice

#### Examples

[@MYDROPDOWN|lower@]
[@MYDROPDOWN|Alt2;Alt2;Alt3;@]

Note: The second example explains that if the first value is selected, show the text "Alt1" rather than the actual text in the list etc.

#### MULTIPLE SELECTION LIST

subcode	x where x = CHOICE
format	lower upper a,b,c,,Z values for each choice tag:TAGNAME where TAGNAME is the code of the TAG

#### Examples

[@MYLIST|lower@]
[@MYLIST|Alt2;Alt2;Alt3;@]
[@MYLIST:1|tag:MYDATA@]

#### SINGLE LINE TEXT

subcode	None
format	lower upper

#### Examples

[@SLTEXT|lower@]

#### MULTIPLE LINE TEXT

subcode	None
format	lower upper

#### Examples

[@MLTEXT|lower@]

#### NUMERIC

Nil - based on format

#### RANKING

subcode	None
format	lower upper a,b,c,,Z values for each choice tag:TAGNAME where TAGNAME is the code of the TAG

#### Examples

[@MYRANK|lower@]

[@MYRANK|Alt2;Alt2;Alt3;@]

[@MYRANK|tag:MYDATA@]

#### SINGLE SELECTION LIST

subcode	None
format	lower upper a,b,c,,Z values for each choice tag:TAGNAME where TAGNAME is the code of the TAG

#### Examples

[@MYSSL|lower@]

[@MYSSL|Alt2;Alt2;Alt3;@]

[@MYSSL|tag:MYDATA@]

#### SLIDER

Nil - shown as number

STAR RATING

Nil - shown as number

# Distributing your Survey

Once you have set your survey up, the next step is collecting responses. To collect responses, you need to distribute your survey.

This chapter describes how you can distribute an anonymous survey using Web Survey Creator.



# Creating an Anonymous Distribution

#### IN THIS SECTION

- 1. When to use Anonymous Surveys
- 2. Creating an Anonymous Distribution
  - 1. Distributing the Link
  - 2. What happens when a Respondent clicks the link?
- 3. Distribution Settings
  - 1. Stopping a Survey
  - 2. Editing a Distribution
  - 3. Setting up a Custom Link
  - 4. Tracking IP Addresses
  - 5. Starting, stopping and Restarting Surveys
  - 6. Dealing with Anonymity
  - 7. Other settings

#### When to use Anonymous Surveys

Anonymous distribution is often the best way to send a survey under the following circumstances:

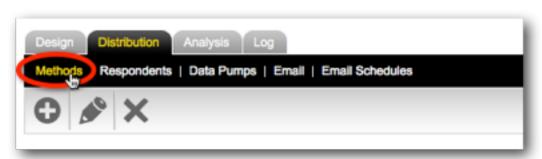
- In situations where people are often more willing to answer questions honestly if their responses cannot be directly attributed to them (for example, an employee survey)
- 2. You may not know who your respondents are until they actually answer the survey (for example, a survey link on your Web site for visitors to click on)

#### Creating an Anonymous Distribution

Each survey you create in Web Survey Creator can be sent anonymously with literally no work needed to set up the distribution.

An anonymous distribution is created automatically when you create a new survey in Web Survey Creator. It is ready to use without any further setup.

Distribution of surveys is performed under the Distribution tab. We want to go to the Methods of distribution.



The anonymous distribution that is created automatically for us is set up with the most commonly used settings, but these settings can of course be changed to meet our exact requirements.

The details for this distribution are shown under Methods.

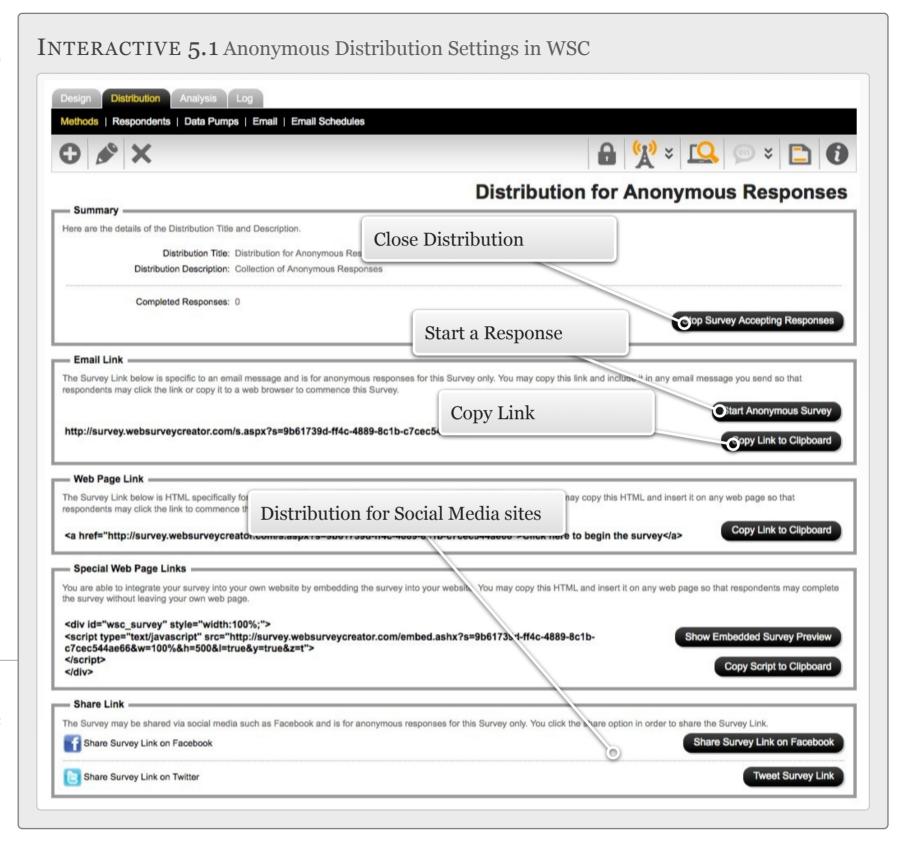
There are two aspects of a distribution that we now need to consider:

- 1. How do we get our survey link out to our respondents?
- 2. What options do we have about how the survey will work when this link is actually clicked by a respondent

#### DISTRIBUTING THE LINK

To distribute our survey to respondents, we can simply copy the survey link by pressing the *Copy Link To Clipboard button*, and:

- · Paste it into an Email
- Use it on our Web site



• Or do anything else we would normally do with a Web link to give people access to that link.

While we could also use this method to copy a link and paste it into social media sites such as Facebook and twitter, we would normally use the specific link sharing capabilities for these sites.

There are two buttons – *Share Survey Link on Facebook* and *Tweet Survey Link* that will post our survey link directly to these sites.

WHAT HAPPENS WHEN A RESPONDENT CLICKS THE LINK?

We need to consider what happens when a respondent clicks on the link. Obviously they will be taken to the survey, but there are a number of variations on how the survey will manage their response.

These options are discussed in the next section.

#### **Distribution Settings**

STOPPING A SURVEY

There may be times when we want to stop respondents from clicking on the link and completing the survey – for example, when the survey process is over, or when we want to make changes to the survey design before any more responses are entered.

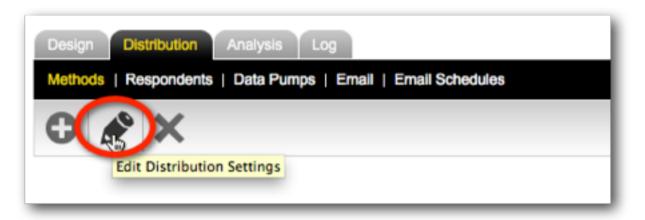
We can halt the collection of responses by pressing the "Stop Survey Accepting Responses" button.



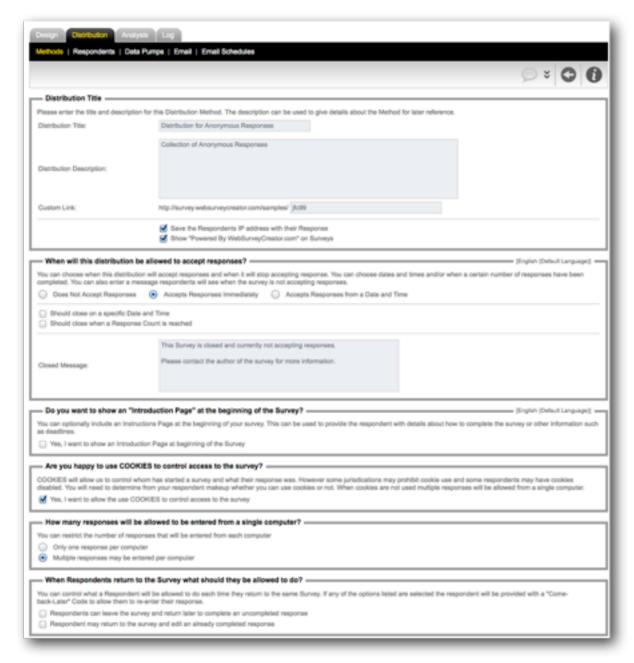
Once pressed, respondents who click on the link will be presented with a message indicating the survey is not accepting responses.

#### **EDITING A DISTRIBUTION**

Everything we have done so far with the distribution is available directly when simply viewing the distribution. If we want to delve deeper into the settings for the distribution, however, we need to actually edit the distribution by pressing the *Edit button* on the toolbar.



When we Edit the distribution we have access to everything about the distribution.



#### SETTING UP A CUSTOM LINK

In addition to the title and description, we also have an option to provide a custom link for the survey – this can be thought of as a more "human readable" link than the automatically generated survey link.

Custom Link: http://survey.websurveycreator.com/samples/ custsat }

Examples of an automatically generated link could look something like this.

http://survey.websurveycreator.com/s.aspx?s=9b61739d-ff4c-4889-8c1b-c7cec544ae66

The custom link, however, could look something like this.

http://survey.websurveycreator.com/samples/custsat

As we can see, they are much more readable.



#### TRACKING IP ADDRESSES

Every survey completed by a respondent is tagged with the address of their computer on the internet, referred to as an IP Address. While this doesn't identify a person specifically (and therefore doesn't stop them from being anonymous), it does provide some information such as the general location of the person. For example, we can usually work out which city in the world a person is from using their IP Address.

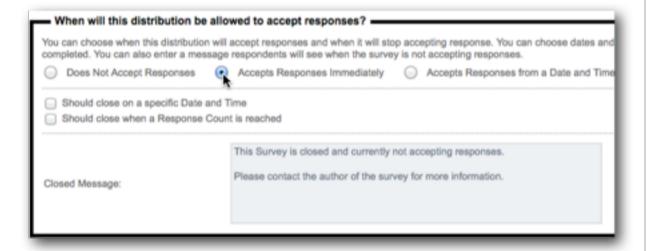
While it is not recommended, we can uncheck the *Save IP Address check-box* on the distribution if we want so even less is known about a respondent.

#### STARTING, STOPPING AND RESTARTING SURVEYS

The next group of settings relate to whether the survey is open to accept responses. Pressing the "Stop Survey Accepting Responses" button, like we did earlier in this section, was just an expedient way to change the settings we see here without having to edit the distribution directly. Because we had clicked the button to stop accepting responses we can see here that responses will not be accepted.

We are now editing the distribution, so we have a lot more options to choose from, including:

- Re-opening the survey to accept responses
- Choosing when the survey closes based on either a time and date, or a number of responses
- Setting the text for the closed survey message



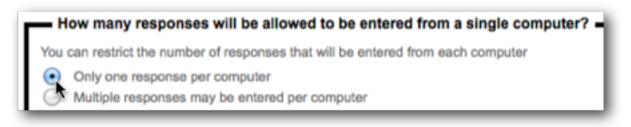
#### DEALING WITH ANONYMITY

One of the biggest issues with having an anonymous survey, is exactly that – the survey IS anonymous. This makes it hard to deal with issues such as:

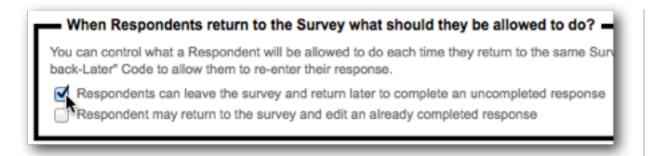
- Stopping people from entering multiple responses
- Allowing people to come back into a partially complete response and complete it
- Allowing people to edit their previously completed response
- Ensuring only the people we want have access to the survey

The distribution has a number of options to manage such issues.

If we want to stop duplicate responses from a single computer, we need to leave cookies enabled on our survey, and select *Only one response per computer*. This will hinder a person's ability to enter two responses to the survey from their computer.



If we want people to be able to either complete a partial response, or edit a previously entered complete response, we check the appropriate check-boxes under the *Return to Survey settings*.



If we want respondents to be able to return, a "Come back Later Code" will be generated for them when they first start the survey.

Here is an example of how the survey would look to a respondent when we use this code. All the descriptive text is fully configurable in the distribution.

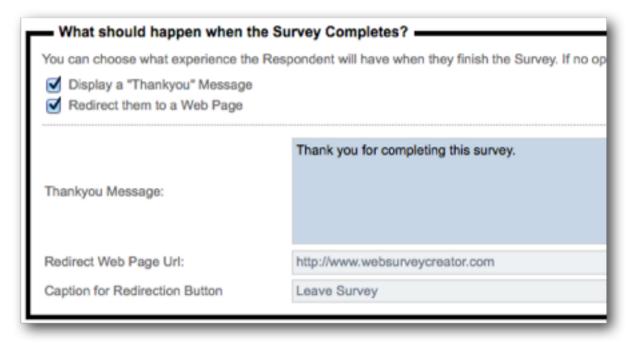
Annual Customer Satisfaction Survey		
Survey "Come-back-Later" Code		
Code.  If you have an existing "Come-back-Later" Code and are allowed to core then click "Continue" to complete or edit your survey. If you have not y	mplete or edit the survey. To do this we provide you with a "Come-back-Later"  mplete or edit your survey you can enter the "Come-back-Later" Code here and yet started a survey or do not yet have a "Come-back-Later" Code then Click "New	
Please enter the "Come-back-Later"  Code you were previously provided:	in order to start the survey.	
	Continue New "Come-back-Later" Coo	
Present	Pv WeblowGreekszon	

A returning respondent enters a code they previously wrote down and presses the Continue button to proceed into the survey and complete or edit their previous response. New Respondents don't have a code – they simply press the "New Come Back Later Code" button to begin the survey.

Before the survey commences, they will then be given their own "Come back later code" which can be used if they need to re-enter the survey and edit their response at a later stage.

#### OTHER SETTINGS

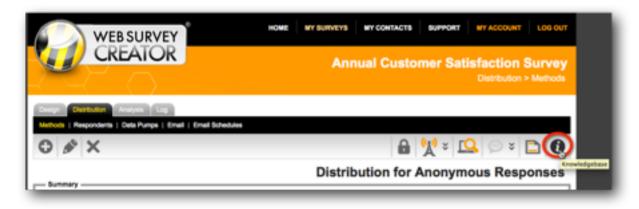
We can choose what a Respondent will see when the survey completes. Usually this will simply be a thank you message, but we have the option to also redirect to another Web page.

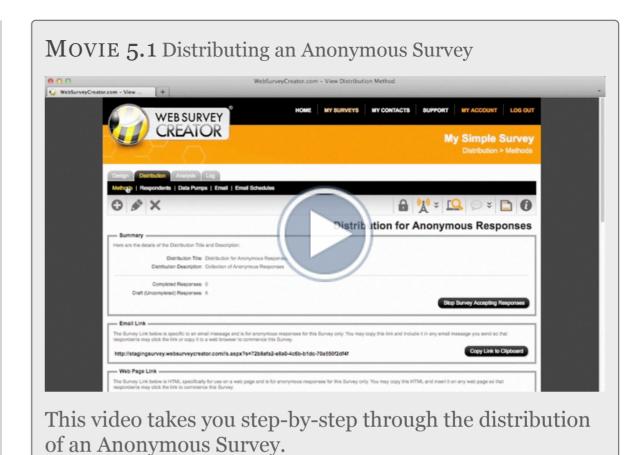


The last setting we have is whether or not we want to require a password for entry into the survey. Enforcing a password means that unauthorized people who stumble across the survey link will not be able to complete the survey, because they will not be able to start the survey without the password that we have only provided to authorized people.

# Step-by-step Video

If you would like to see how to distribute an Anonymous Survey, you can view it in our step-by-step video. You can access this video online by pressing the *Knowledgebase button* on the toolbar while working on survey content.





# Distributing a Survey to a List of Respondents

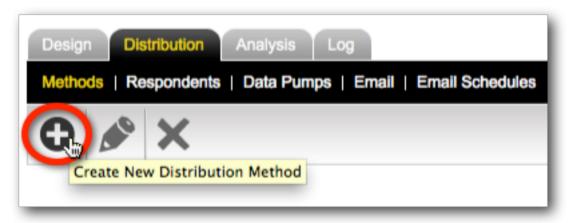
#### IN THIS SECTION

- 1. Creating a Respondent Distribution
- 2. Adding Respondents to a Distribution
- 3. Sending an Invitation

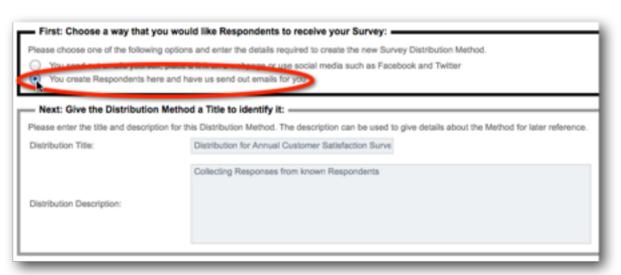
#### Creating a Respondent Distribution

We have seen how an Anonymous Distribution is created when we create a new survey in Web Survey Creator. If, however, we don't want anonymous respondents, we need to create a new distribution, known as a "Respondent Distribution".

We click the *New Distribution Method button* under Methods on the Distribution Tab to create a new distribution.



The type of distribution we want to create will use a list of respondents, so we would choose "You create Respondents here and have us send out emails for you".

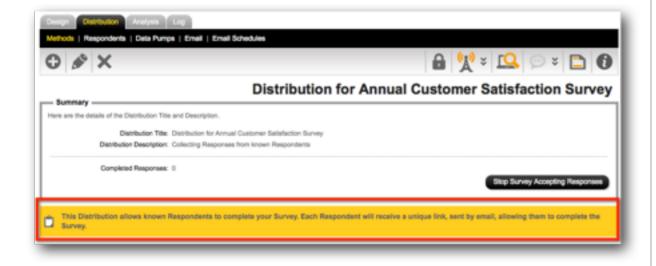


We click the *Create New Distribution button* to create our distribution.



To see what options we can change on the distribution, see the Section 1 in this chapter about "Creating an Anonymous Distribution" (the options are exactly the same as for anonymous distributions). For this section, we will assume that the default settings are sufficient for our use.

You will notice that a link can't just be copied and used for this type of distribution - each respondent will receive a personal link. This is made clear when viewing the distribution:



#### Adding Respondents to a Distribution

Once the distribution is set up, we need to add respondents to it. This is the list of people we will be Emailing with an invitation to the survey.

We set up these people under respondents on the Distribution tab.

There are three methods to load respondents:

- 1. Creating from a Text List
- 2. Importing from another survey
- 3. Importing from an Address Book

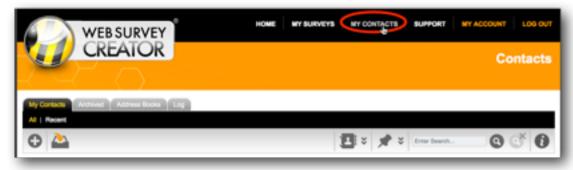
#### CREATING RESPONDENTS FROM A TEXT LIST

Respondents can either be created directly in a respondent distribution, or they can be created in an *Address Book* for later use in a respondent distribution (methods 1 and 3 above). The way to do the import from a text list is the same for both.

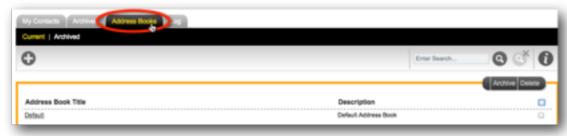
Let's assume that we will first create an Address Book and create respondents in this Address Book for later use.

A summary of the steps to create this Address Book are as follows:

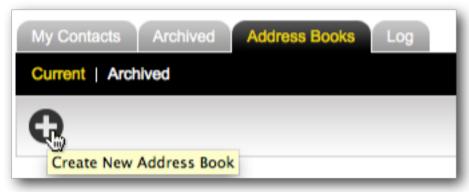
1. Click on the *My Contacts* tab from the main Web Survey Creator window.



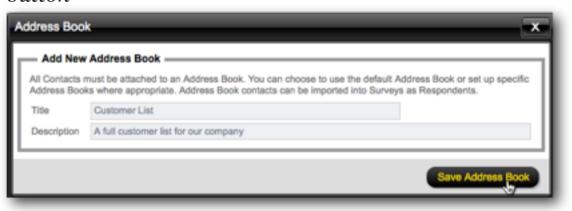
2. Click on the Address Books tab



3. Click the Create New Address Book button on the toolbar



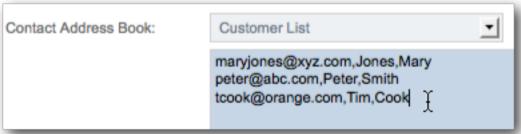
4. Name the Address Book and click the *Save Address Book* button



5. Return to the *My Contacts tab*, and click *Create Contacts from Text List* on the toolbar



6. Choose the Address Book we have just created, and paste in the details of the customers in the format requested in the import page



7. The contacts will be imported into the Address Book for use in one or more surveys

Creating a respondent from a text list is demonstrated in more detail in the video tutorial on *Managing Contacts* that can be found by clicking on the *Knowledgebase button* on the toolbar.



If you want a more in-depth look at the options you have when doing an import we highly recommend this video tutorial.

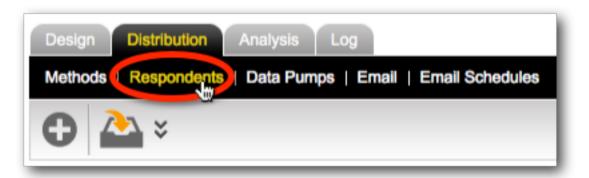


A Step-by-step guide to managing contacts, including the process of importing contacts into an Address Book.

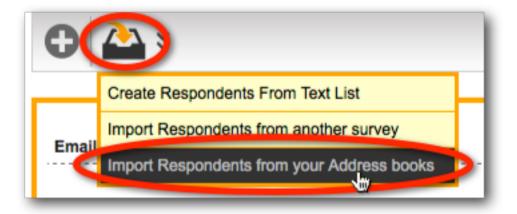
#### IMPORTING RESPONDENTS FROM AN ADDRESS BOOK

We've just created an Address Book with our contacts in it. We now want to use these people in the Customer address book as our respondents.

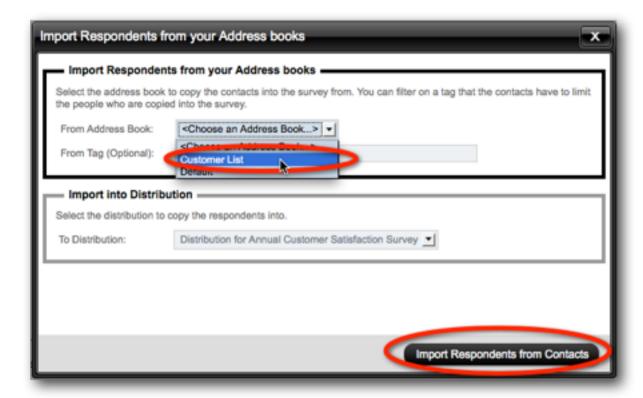
We need to go to the *Respondents menu* under the *Distribution tab*.



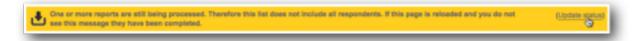
We click on the *Import button* on the toolbar, and select the third option - *Import Respondents from you Address books*.



Let's choose our Customer List address book, and then press the *Import Respondents from Contacts button*.



A message shows at the top of the respondent browse that indicates the import is still being processed. We can press the update status link to refresh the status of this message. Once the message is gone, we know that the import is complete.



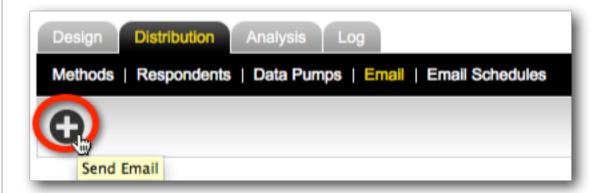
#### Sending an Invitation

OK, we now have our list of respondents. The next step is to send an invitation to these respondents to complete the survey.

We compose our Emails under Email on the Distribution tab.



We create a new Email by pressing the Plus button on the toolbar.



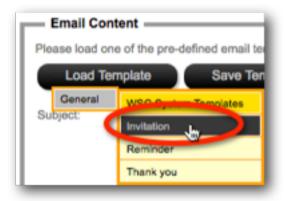
There are three things we need to deal with when creating an Email:

- 1. Who the email will be sent to
- 2. When the Email will be sent
- 3. What the content of the Email will be

The who and the when are pretty straightforward – we want to send to all respondents, and we want to send the Email immediately. Other options would include the ability to only Email people who have not yet responded, and optionally send the emails at a particular date and time.



The easiest way to start our Email content is to load from a standard template.

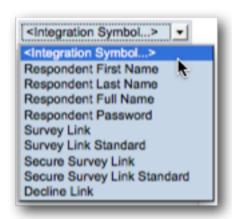


We can enter whatever we like for our Email content, but there are a couple of key things that need to be included.

Dear {RespondentFirstName},
You have been selected to participate in a survey. Please click on the following link to commence the survey:
(SurveyLink)
If you wish to decline this survey and do not wish to receive any further emails regarding this survey please click on the following link.
{DeclineLink}
We appreciate your time, and thank you for your assistance. \( \)

The Email must include a link to our survey, and it must include a **Decline Link** that allows a person to indicate they do not wish to include any more Emails. This second link is a requirement to meet anti-SPAM regulations.

Other content that may be entered includes the respondent's name. The available data that can be included can be chosen from the Integration Symbol drop-down.



To ensure we are happy with the Email format, we will press the *Test button*.



An Email will be sent for one of the respondents directly to our Email address, so we can check the Email link works, and the content looks good in our Email system.

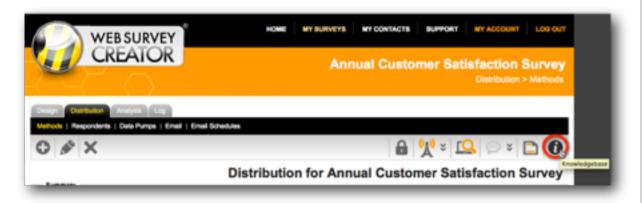
Once we are happy with the Email, we can press the *Send* button.

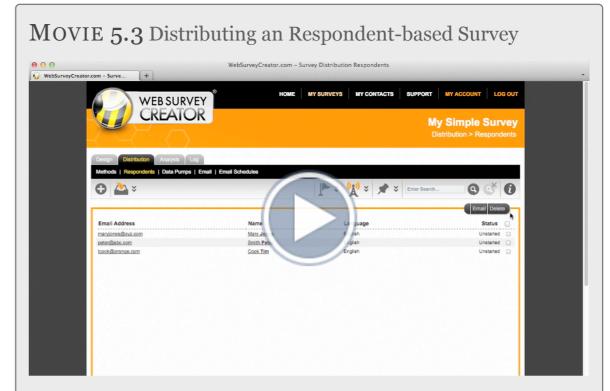


We have now distributed our survey!

# Step-by-step Video

If you would like to see how to distribute an Respondent-based Survey, you can view it in our step-by-step video. You can access this video online by pressing the *Knowledgebase button* on the toolbar while working on survey content.



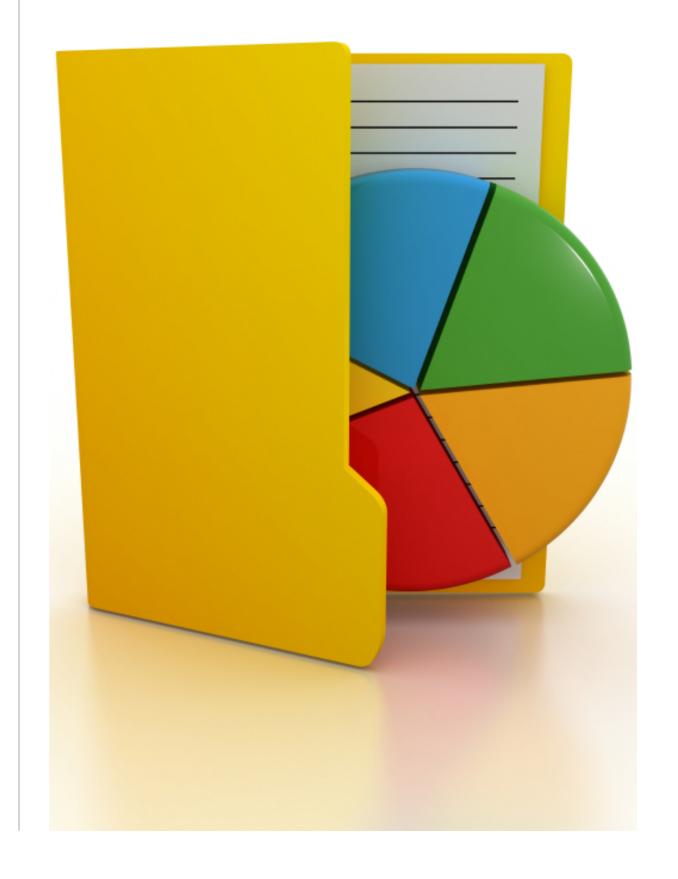


This video takes you step-by-step through the distribution of a Respondent-based Survey.

# Survey Reports

Reporting is the main objective of any survey process. The types of reports you want to produce may vary from survey to survey, and will also depend on your audience.

Senior management will often just want a quick overview of results. Researchers, however, will want a detailed extract of raw responses in a format they can use in a statistical analysis program.



#### Online Statistics Portals

#### IN THIS SECTION

- 1. What is a Report?
- 2. The Statistics Overview in WSC
- 3. Creating an External Web Portal
- 4. Controlling Access to Web Portals

#### What is a "Report"?

When we are talking about a "report" the first thing that jumps to mind is some sort of paper document with charts and figures on it. While this definitely is a "report", there are all sorts of other variations we need to consider:

- 1. An **Online Statistics Portal** that provides real-time results through a browser
- A native report produced in a word processor, such as Microsoft Word
- 3. A native export to a spreadsheet program such as Microsoft Excel
- 4. A native export to a statistics program such as SPSS

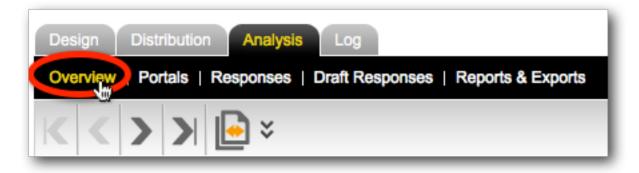
In this section we will look at Online Statistics Portals.

#### The Statistics Overview in WSC

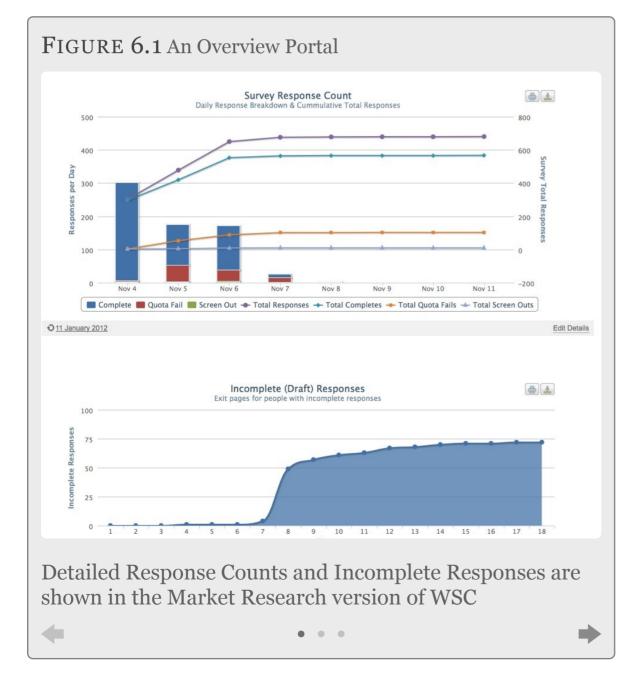
One of the biggest issues with Web Portals can be the time it takes to set them up. Fortunately, Web Survey Creator provides a **Statistics Overview Portal** that requires no setup at all.

#### OPENING THE STATISTICS OVERVIEW

The Statistics Overview Portal is accessible from *Overview* under the *Analysis tab*.



The content of the portal will depend upon the questions asked, and the version of WSC being used.

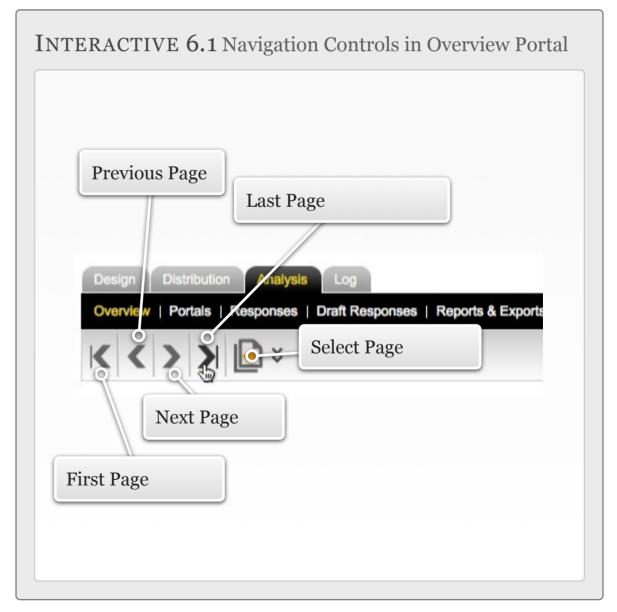


#### NAVIGATION IN THE OVERVIEW PORTAL

The Overview Portal shows:

- 1. A front page with general survey statistics
- 2. Question pages with each page matching a page in the survey design

We can navigate between these pages using the *Navigation* buttons on the toolbar.



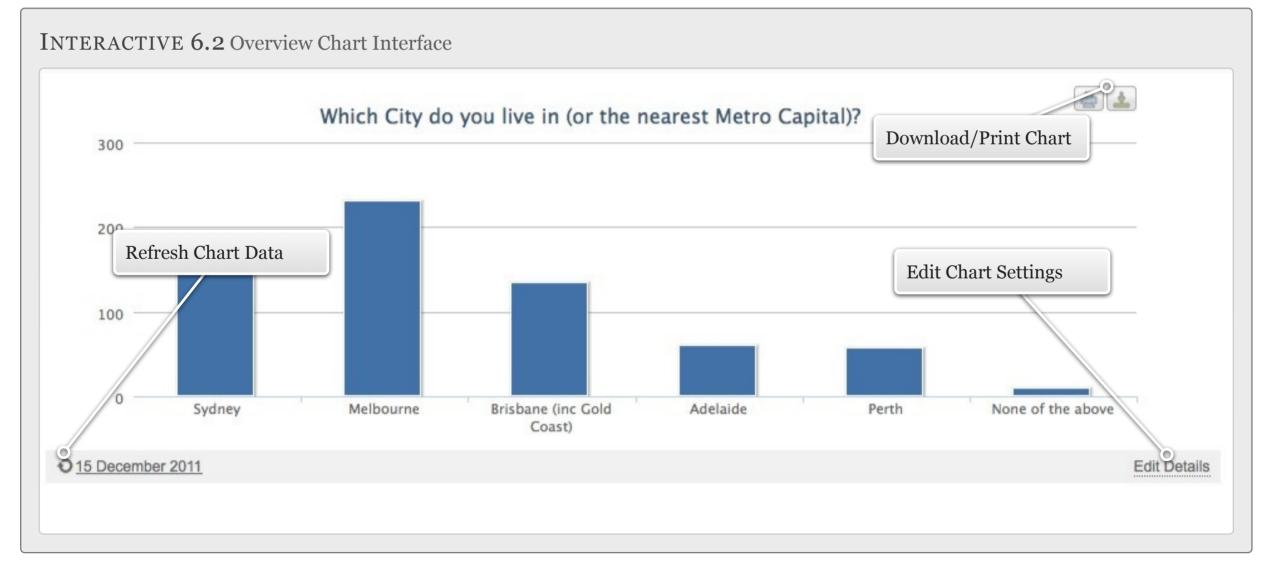
The *Select Page button* on the toolbar is a particularly quick way to get to the page we want. We simply click on the page we want to go to, and we will be shown that page in the Overview.

#### WORKING WITH OVERVIEW CHARTS

The beauty of the Overview is that it works without any effort. There may be times, however when you want to do something more with the chart than just look at it. The overview chart interface allows you to:

• *Refresh Chart Data* - the overview is very fast, even when large amounts of data exist, because it pre-calculates the data, and updates it regularly (rather than calculating every time you go to the chart). Pressing the *Refresh button* will perform an immediate refresh.





• *Edit Chart Settings* - headings, pre- and post- text can all be changed for a particular chart. This is great for adding explanatory text for a chart.



• Download/Print Chart - if we want to quickly add the chart to a report, we can click the Print button or the Download button for the chart

#### Creating an External Web Portal

GOING BEYOND THE STATISTICS OVERVIEW

The Statistics Overview is great for showing the statistics for a survey, but has limitations:

- Only WSC users have access to the overview external stakeholders have no access
- 2. All questions and statistics are shown you can't exclude certain questions for example

What is needed is a way to view the parts of the Overview you want to view, and to allow this view to be accessible to people outside of WSC users.

#### WHAT IS A WEB PORTAL?

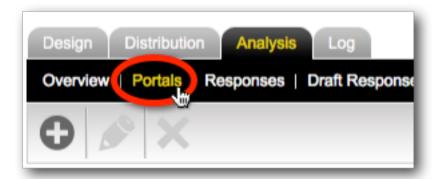
From the perspective of WSC, a **Web Portal** can be thought of as a "view" of some or all of the content available in the Statistics Overview.

A Web Portal differs from the Statistics Overview in the following ways:

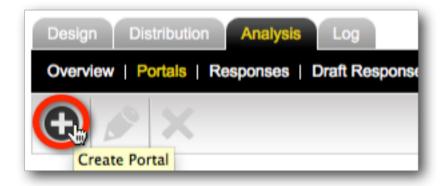
- A Web Portal is accessible to people who are not users of WSC
- 2. The Web Portal theme and layout borrow from the theme and layout you have used for your Web Survey.
- 3. The content in the Statistics Overview is fixed, whereas Web Portal content is configurable:
  - a. A "Home Page" for instructions and other details can appear at the front of the portal
  - b. You choose which survey overview charts to show some, all or none
  - c. You choose which survey question stats to show some, all or none
  - d. Only one chart is shown on screen at once (doesn't follow the page structure of the survey)
  - e. For market research users, a table of quotas can optionally be shown as a portal item

#### CREATING A WEB PORTAL

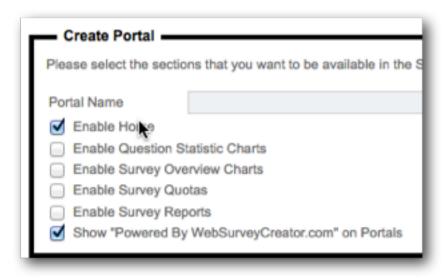
Web Portals are created from *Portals* under the *Analysis tab*.



To add a new portal, we click the *Create Portal button* on the toolbar.



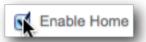
When we create our Web Portal, it's all about what we want to include in the portal.



Let's look at each piece of content we can include.

#### Home Page

To include a *Home Page*, we must ensure it is included in the content we are showing by checking the *Enable Home checkbox*.



The content that can be entered is straight text, however with the right **Content Tags** you can do a lot of clever things. For example, the following content:



creates the following result:



#### **Question Statistics**

To include *Question Statistic Charts*, we must ensure it is included in the content we are showing by checking the *Enable Question Statistics Charts checkbox*.

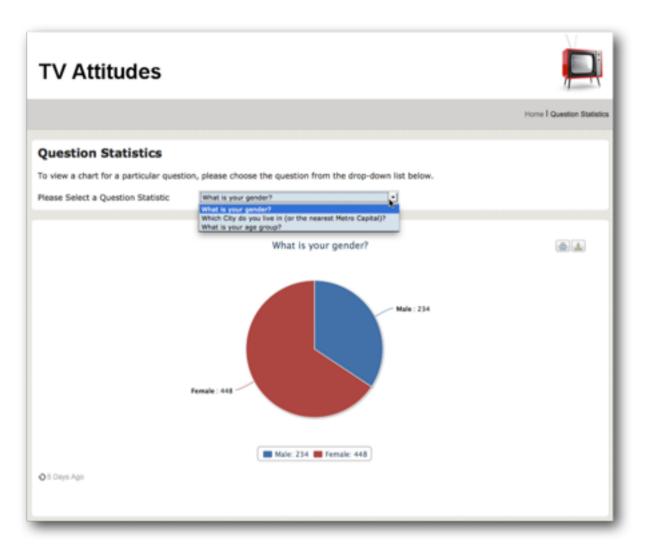


The settings that can be changed are shown below.



Note that we have decided not to show all questions, so we have selected exactly which ones we want to show.

The resulting portal page for Question Statistics looks as follows:



#### Survey Overview Charts

To include *Survey Overview Charts*, we must ensure it is included in the content we are showing by checking the *Enable Survey Overview Charts checkbox*.

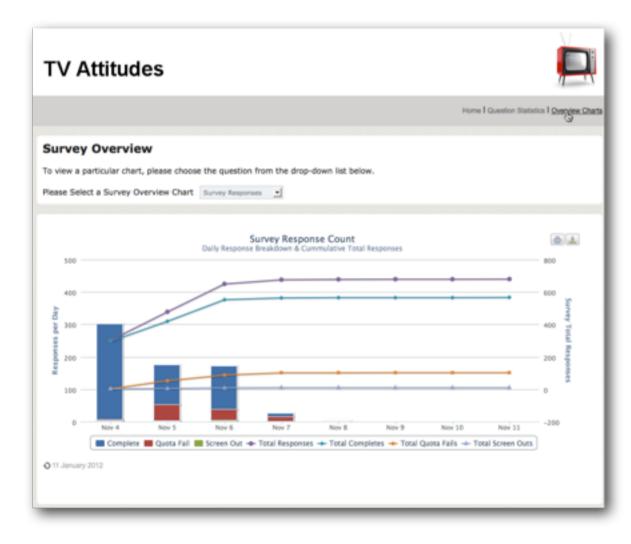


The settings that can be entered are very similar to the statistics questions. The settings we have chosen for our portal are shown here:

Overview Charts			
You can choose to select all Overview Charts, or you can select specific Charts you want to be available in the portal.			
Overview Charts Menu	Overview Charts		
Overview chart Selection Text	Please Select a Survey Overview Chart		
Survey Response Chart Name	Survey Responses		
Survey Ending Pages Chart Name	Survey Ending Pages		
Show All Overview sharts     Include only the Selected Overview charts			

Note that we have decided to show all overview charts.

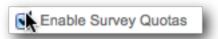
The resulting portal page for Overview Charts looks as follows:



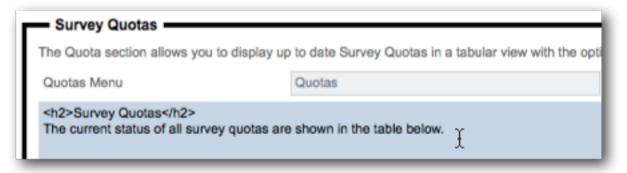
#### **Survey Quotas**

To include *Survey Quotas*, we must ensure it is included in the content we are showing by checking the *Enable Survey Quotas*.

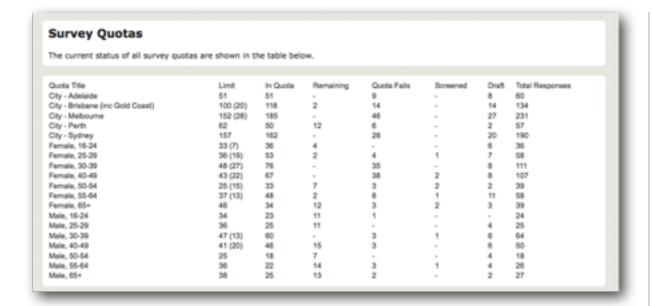
Quotas can only be created in the Market Research editions of Web Survey Creator. If you are using a lower license this option will not be available.



Nothing really needs to be set up for Quotas, just some basic details:



The chart that is shown will be based upon the survey quotas that have been set up. The setup of quotas goes beyond the scope of this book, but the display of the quotas in the Portal is shown here for completeness.



#### Survey Reports

To include *Survey Reports*, we must ensure it is included in the content we are showing by checking the *Enable Survey Reports checkbox*.



When setting up the reports, we can choose which reports we want to show.



This screen raises a good question:

Where does the report list come from?

As it happens, every time we create a new report in WSC, the settings are stored so that the report can be reproduced. The reports shown for selection are the reports that were previously created.

We will see how to create reports in the next section.

The portal for reports will look as follows:



#### Controlling access to Web Portals

Web Portals can contain a wealth of information. This is great if you are authorized to see that information, but could be a problem if you are not supposed to see it. Rather than protect Portals with a complex user system, Web Survey Creator takes a different approach, which could be described as:

"Create the Right Portal for the Right Person"

So, how does this work?

#### CREATING MULTIPLE PORTALS

There is no limit to the number of portals you can create for a single survey. The idea is to create an additional portal for each type of person who needs access to it. An example would be:

WHO	WHAT THEY WANT	WHAT THEY GET
Your Manager	Wants to know if we are getting enough responses	Overview stats only
Researcher	Wants to get the raw responses for their stats package	Reports only
Your Client	Wants to know everything (like all clients)	Full Portal

Each portal you create, has a unique link generated for it that can not be guessed, and therefore is secure as long as you only send it to the people who need it. For example, a portal link could be: http://portal.websurveycreator.com/p.aspx? p=4528e4df-75cc-4ffe-ba31-d59cd6602f4b&lang=en&t=h

The portal is identified with the identifier:

"4528e4df-75cc-4ffe-ba31-d59cd6602f4b"

Every portal is given a completely different identifier, so no one except the right people can get in.

#### **CLOSING A PORTAL**

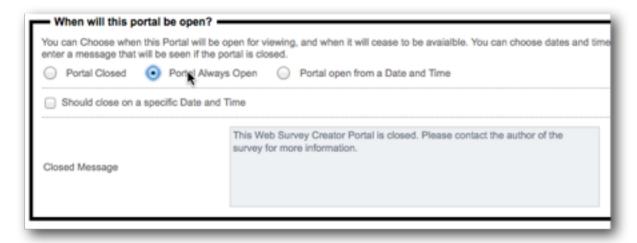
There may be times when you don't want anyone in the portal. This could be because:

- The project has ended and the portal should no longer be accessed
- 2. You don't want the portal accessed until a certain time/ date (e.g., give a client access on day 3, when there will be some valid data in the survey)
- 3. You need to make modifications to the survey or the portal, and you don't want people using it

All these situations and more can be dealt with by the *Portal Open Settings*. These settings allow you to:

- 1. Open the portal (the default state)
- 2. Close the portal
- 3. Open at a specific time/date

#### 4. Close at a specific time/date



### Reports

#### IN THIS SECTION

- 1. Types of Reports
- 2. Responses Export
- 3. Choices & Comments
- 4. SPSS Export
- 5. SurveyCraft Export
- 6. Using Previously Created Reports

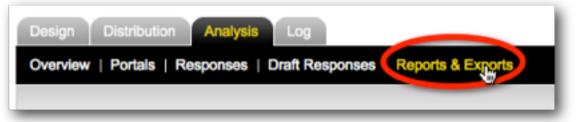
#### Types of Reports

Web Survey Creator produces a number of different report types:

REPORT	DETAILS
Responses Export	An export of responses to an Excel spreadsheet
Choices & Comments	A Word document that contains the two main questions we want quick information on - choice questions and comments
SPSS Export	An export of the survey data as a native .sav file that can be opened in SPSS for further analysis
SurveyCraft Export	An export of survey data that can be imported into the SurveyCraft MR analysis tool

All reports are created in a similar way, and with a consistent interface. The steps to creating any report are:

1. Go to Reports and Exports on the Analysis tab.



2. Click the *Create Report button* on the toolbar

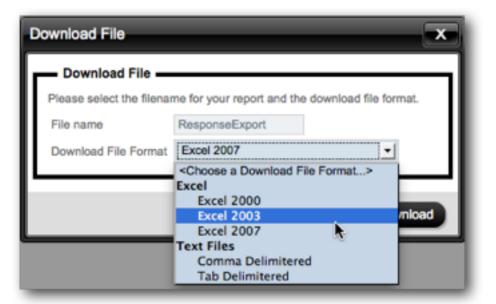


3. Choose the report type, and enter the details for the report



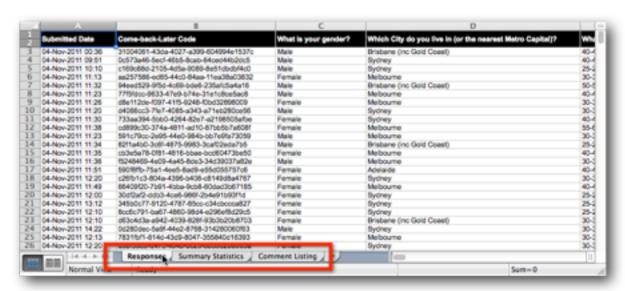
# Responses Export

A responses export is the perfect way to extract the raw responses of a survey, together with summary statistics. The export is in Microsoft Excel format, making it easy for most people to open without any specialized software. This report can be extracted in a format that is most appropriate to your version of Excel (or even can be exported as a text file).



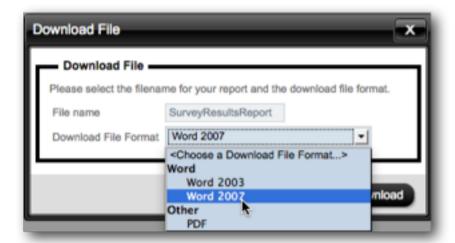
This report goes across multiple worksheets, providing:

- 1. Raw Response Data
- 2. Summary Statistics
- 3. Comments

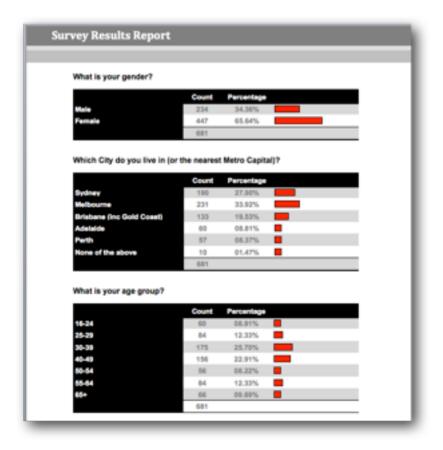


### **Choices & Comments**

The Choices & Comments report can be generated as either a Word document or a PDF file.



In both cases, the report follows a simple structure that provides an easy-to-read summary of the current survey statistics and comments that have been entered.



# **SPSS** Export

The SPSS Export creates a file that the SPSS statistical package can load natively. All aspects of the data, including choice labels, are brought into SPSS.

The file can be saved locally for opening in SPSS.

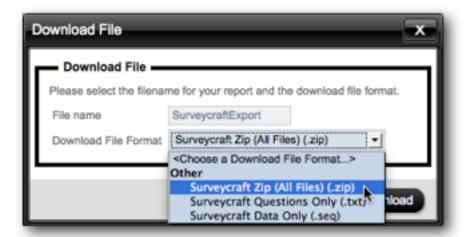


# SurveyCraft Export

SurveyCraft is a product used by Market Research companies. Importing data into SurveyCraft requires two files:

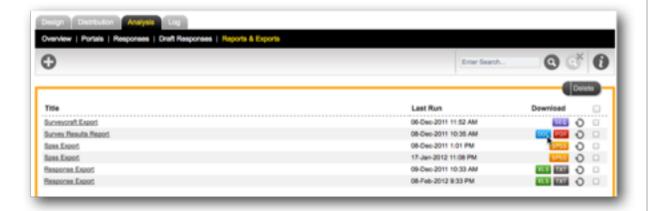
.txt	A text file with a listing of all the questions
.seq	A file with all the survey data

Web Survey Creator makes these files easy to download in a single compressed file (.zip).



# **Using Previously Created Reports**

Every report you create can be easily reprinted from the *Reports Browse*.



All reports are immediately available for download without regenerating the data. For example, we can grab the *Survey Results Report* in Word format by clicking on the *DOC icon* for the report.



If we want a report with the latest data, we can click the *Refresh icon*.



The report will indicate that it is regenerating.



Once the report has been recreated, you can click on the *DOC icon* again to download this newly generated report.

## Access Code

An Access Code is a unique code made of alphanumeric characters that entered for a question to identify that question. This identification can be used for a number of things, including piping the question's data to another part of the survey, or accessing the question in scripting.

#### **Related Glossary Terms**

Data Piping

Index Find Term

**Chapter 4 - Using Data Piping** 

Chapter 4 - Using Data Piping

# Address Book

An Address Book stores a list of "contacts" that can be used as respondents in one or more surveys. Respondents may be entered manually one at a time, or imported from a text file into an Address Book.

#### **Related Glossary Terms**

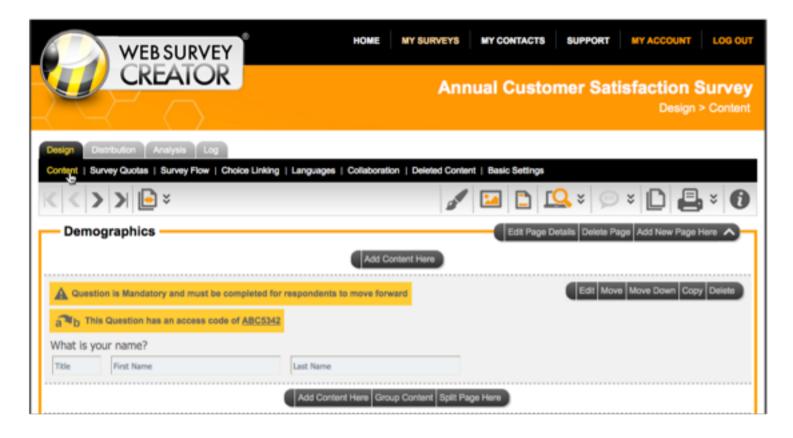
Drag related terms here

Index Find Term

**Chapter 5 - Distributing a Survey to a List of Respondents** 

## Content Designer

Web Survey Creator's content designer allows you to add all the necessary survey content in a visual editor. Types of content include questions, text, and media such as videos.



#### **Related Glossary Terms**

Demographic Question Type, Matrix Question Type

Index Find Term

**Chapter 2 - Creating Survey Content** 

# **Content Tags**

Content tags allow you to enter simple text into a content area (for example, question text) that will be converted into a richer result when displayed in a browser.

For example:

This is <b>bold</b> text

will be displayed as:

This is **bold** text

### **Related Glossary Terms**

**Content Designer** 

Index Find Term

Chapter 2 - Reference: Content Tags

# **Data Piping**

Data piping is the piping of information about the survey respondent, or one of their answers, to somewhere in the survey content.

When looking at a particular data piping code, the structure of the code is as follows (spaces are only shown for ease of readability):

```
[@ QQQQQ: subcode | format @]
```

where:

#hidden# may be included to hide any data pipe. The format for a hidden code would therefore be:

```
[@ QQQQQ: subcode | format #hidden# @]
```

#### **Related Glossary Terms**

Access Code

Index Find Term

**Chapter 4 - Using Data Piping** 

# Decline Link

A Decline Link is a link that is included in an Email to allow the recipient to indicate they no longer want to participate in the survey, or perhaps in any surveys. It is critical to have such a link to meet anti-SPAM requirements.

#### **Related Glossary Terms**

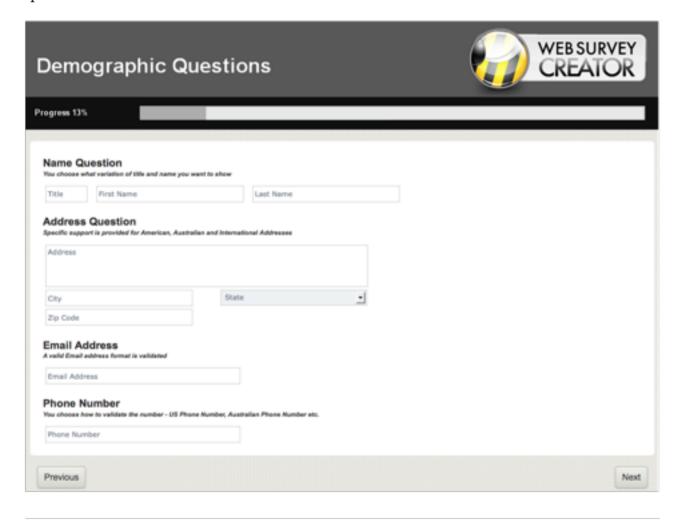
Drag related terms here

Index Find Term

**Chapter 5 - Distributing a Survey to a List of Respondents** 

### **Demographic Question Type**

Demographic questions are formatted basic on the content of the question your are after - name, address, email or telephone. While they look similar to Text Questions, they differ in that each of them has a specific purpose, and therefore has certain formatting and validation that ensures more precise entry of data than a standard text question.



#### **Related Glossary Terms**

Content Designer

Index Find Term

# **Employee Engagement Survey**

Employee Engagement Surveys enable organizations to diagnose current levels of engagement and identify the factors that drive engagement. Employee engagement surveys allow you to identify the key factors that can be leveraged to:

- Enhance employee engagement
- Lead to better performance
- Reduce employee turnover
- Reduce absenteeism.

#### **Related Glossary Terms**

Drag related terms here

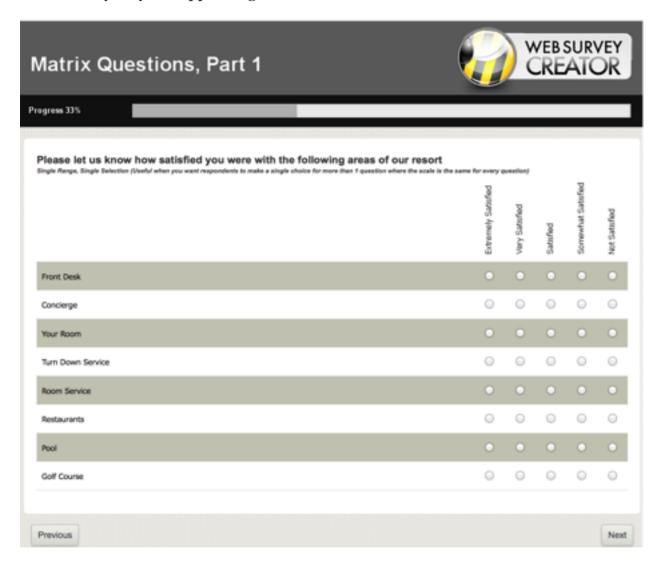
Index

Find Term

**Chapter 1 - Introduction** 

## Matrix Question Type

Matrix questions allow a lot of data to be entered in a relatively small amount of space. Each of the questions (or "rows") in a matrix share the same possible choice values, which is why they can appear together.



#### **Related Glossary Terms**

Content Designer

Index Find Term

## Online Statistics Portal

An Online Statistics Portal is a Web Site specifically designed to show statistics for a survey. It can supplement or replace traditional paper-based reporting, and has the significant advantage that all statistics can be calculated in real time.

### **Related Glossary Terms**

Drag related terms here

Index Find Term

# **Professional Quest**

Professional Quest is a Desktop-based survey design, distribution and analysis tool that has been developed by Dipolar Pty Limited. It was the fore-runner to Dipolar's Web Survey Creator tool, which is a fully hosted online survey solution.



#### **Related Glossary Terms**

Web Survey Creator

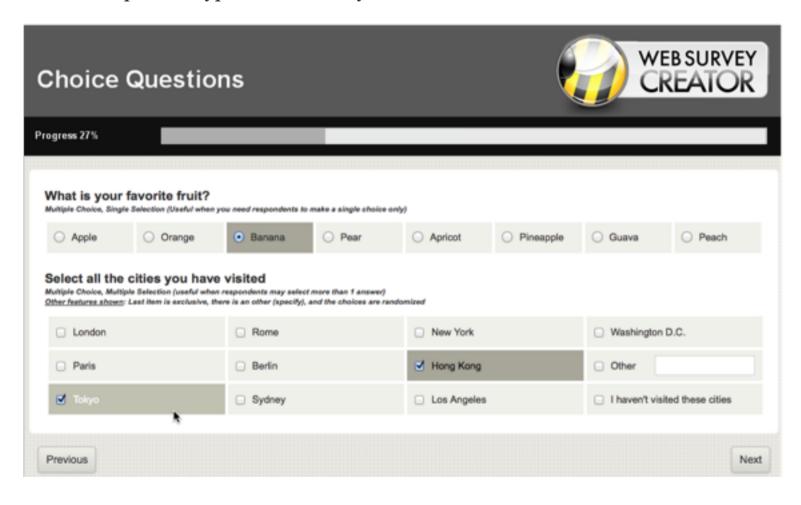
Index

Find Term

**Chapter 1 - Introduction** 

### Selection choices

"Choices" are discreet answers that may be chosen in either a "Choice" question type or a "Matrix" question type in Web Survey Creator.



#### **Related Glossary Terms**

Content Designer, Matrix Question Type

Index Find Term

# **Statistics Overview Portal**

The Statistics Overview Portal is an internal portal that provides a user of Web Survey Creator full access to all question statistics, and overview statistics for the survey. Unlike a Web Portal, the overview portal can not be accessed by external people.

#### **Related Glossary Terms**

Web Portal

Index Find Term

## Web Portal

A Web Portal is an externally accessible Web site that provides statistics for a survey. In Web Survey Creator, a Web Portal provides access to some or all of the statistics provided in the internal Overview Portal. The content shown is determined when the portal is set up.

A Web Portal may also optionally provide access the Reports and to Respondent Quota levels.

#### **Related Glossary Terms**

Statistics Overview Portal

Index Find Term

# Web Survey Creator

Web Survey Creator is a hosted survey design tool that handles all aspects of survey creation, distribution and analysis. Key features of the software include mobile surveys, collaboration and multi-lingual surveys.



Web Survey Creator has been developed by Dipolar Pty Limited as a "sister product" to their desktop-based Professional Quest survey software.

#### **Related Glossary Terms**

**Professional Quest** 

Index

Find Term